

2019 — 2020

# POSITIVE MOBILITY *Makers*



PROTECTING  
BOOSTING  
BUILDING  
OPENING  
SERVING  
SHARING  
ENSURING  
EMPOWERING  
INNOVATING

# NOTE TO THE READER

This document was written and designed prior to the Covid-19 pandemic.

While the information regarding performance in 2019 remains relevant, the forecasts for 2020 as well as other forward-looking statements contained within the report do not reflect the change in circumstances that has since taken place. VINCI Concessions reserves the right to subsequently publish updated versions of the report that take into account the global economic changes that occurred in the first half of 2020.

Published on our websites, each update will be explicitly labelled as such in an effort to maintain transparency.

Protecting

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It's what we call **POSITIVE MOBILITY**; promoting a long-term vision — we operate certain mobility structures over several generations — that aims to make mobility safer, more sustainable, inclusive and accessible to all. Thinking long term also means broadening our horizons, going beyond the infrastructure itself. We want to forge a place for our company at the heart of the regions in which we operate and enable them to unlock their full potential.

To translate **THIS VISION INTO ACTION**, we possess a valuable asset – our dedicated team, the 26,000 employees<sup>(1)</sup> of 50 different nationalities that make up the VINCI Concessions workforce. They combine their expertise to achieve the shared goal of making mobility more innovative and user-friendly through effective services that anticipate passengers' needs all over the world. It is thanks to our people that we are able to improve mobility everywhere we operate. These men and women represent our strength.

**THE POSITIVE  
MOBILITY** *Makers*

(1) Workforce at 31/12/2019



VISION

# STRONGER TOGETHER



Mobility is, first and foremost, about people.  
Not only because it connects individuals and the communities in which they live — we always travel among or between groups — but also because behind every journey is a team of people, including infrastructure operators and a network of experts.

At **VINCI CONCESSIONS**, we develop and manage nearly 80 airports, motorways and railways in 21 different countries. We believe mobility is essential to open up a region, boost its economic and social development and create opportunities and empower people, both individually and collectively. The idea of fostering and facilitating connections between regions, countries and communities is what drives us each day.

VINCI Concessions is the world's leading developer of mobility infrastructure. Our broad and unparalleled range of expertise enables us to demonstrate leadership in the airport, road and railway industries around the world, while creating a positive impact for all our stakeholders.

## 21 countries

Brazil . Cambodia . Canada . Chile . Colombia . Costa Rica . Dominican Republic  
France . Germany . Greece . Jamaica . Japan . Peru . Portugal . Republic of Ireland  
Russia . Serbia . Slovakia . Sweden . United Kingdom . United States



**A leading  
provider  
of mobility  
services**

**Committed  
employees**

**Serving  
regions**

**Sustainable  
mobility**

**Customer-  
friendly  
services**

nearly **80**  
mobility structures

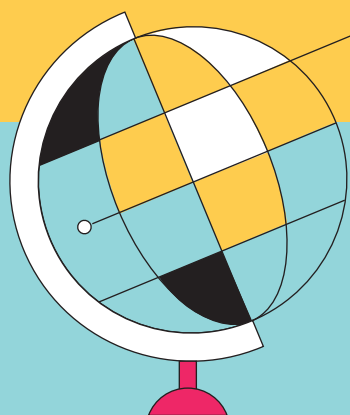
**#1**

private airport operator  
in the world



**45**  
airports

**255 million**  
passengers at our airports



**21**  
countries

**26,000<sup>(1)</sup>**  
employees around the world

(1) Workforce at 31/12/2019



**100**  
employees  
on international transfers



**325**

new airline routes opened  
in 2019



**13**

capitals connected  
(Athens, Belfast, Belgrade,  
Bogotá, Dublin, Lima,  
Lisbon, London,  
Moscow, Phnom Penh,  
Santo Domingo, Santiago  
de Chile, Stockholm)



**3**

carbon neutral airports:  
Lyon, London Gatwick  
and Guanacaste (Costa Rica)



**35%**

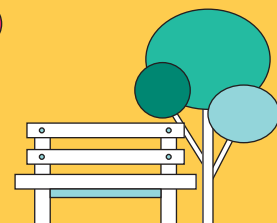
lower carbon emissions  
per passenger since 2014



**150,000 m<sup>2</sup>**  
of retail space in the airports  
in our network



**Over 200**  
service and rest areas  
on our motorways





# #1

motorway concession holder in Germany

3,695 km  
of road network



537 million  
vehicles on our roads

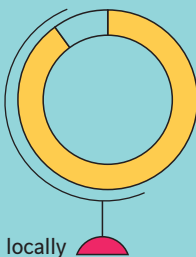
# #1

motorway operator in Russia



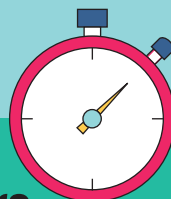
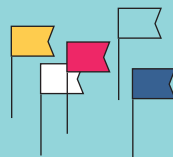
# 80%

of people employed locally



# 50

nationalities with English, Japanese and Portuguese the three most widely spoken languages in our network



# 5.5 hours

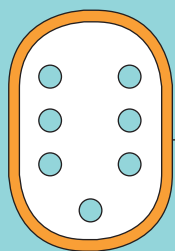
the time it now takes to travel between Moscow and Saint Petersburg using the M11 motorway, completed in 2019.

Previously, it took over nine hours



# 210 km

of motorway and road services commissioned in 2019



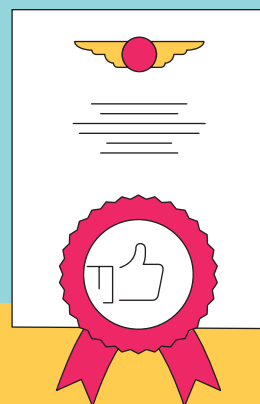
# 200

electric charging points available on our network



# 30

ISO 14001 certifications



# 1.3 million

subscribers to our e-mobility and digital road services



# 5



centres of excellence for Innovation (London, Lisbon, Lyon, Lima, Bordeaux-Villongnon)



**302 km**  
of high-speed railway

**20 million**  
travellers on the SEA HSL

**1<sup>st</sup>**

private high-speed rail  
operator in France

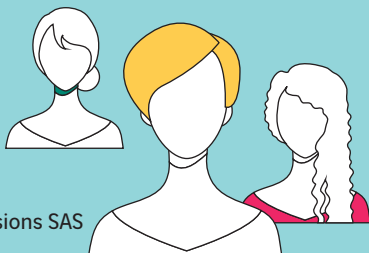


**34%**

of positions held  
by women

**95 out of 100**

Gender Equality Index  
score of VINCI Concessions SAS  
in 2019



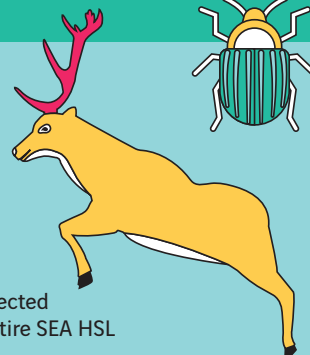
occupancy rate of the new Thalys  
railway route between Brussels  
and Bordeaux



**€5.7 billion**  
will be invested in our  
infrastructure by 2025

**10,850 MWp**

capacity of installed photovoltaic  
panels for energy self-sufficiency



**223**

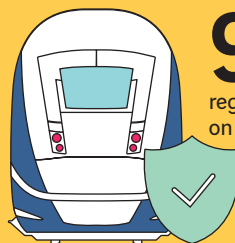
species protected  
along the entire SEA HSL



**Over 10**

quality of service awards, including:

- ACI Europe: Lyon, London Gatwick
- Airport Service Quality (ACI):  
Porto, Guanacaste, Puerto Plata
- Skytrax: Kansai International
- OAG: Osaka Itami
- CAPA Centre for Aviation: Phnom Penh



**97%**

regularity  
on the SEA HSL



**ABHI CHACKO**  
Head of Innovation,  
London Gatwick airport,  
United Kingdom



**BOCHRA HAMMOU**  
General Manager,  
Sihanoukville airport,  
Cambodia



**NICOLAS HÉLAS-OTHENIN**  
Operations Manager and Digital  
Transformation Lead, SEA high-speed  
rail line, LISEA, France



**CURTIS KOSKIE**  
Health and Safety Manager,  
Regina Bypass,  
Canada



**MYLÈNE LEULY**  
Director, Chambéry  
Savoie Mont Blanc airport,  
France



**MARIE-LOU PADILLA**  
Customer Experience Operations  
Director, Aéroports de Lyon, France



**FRANCISCO PITA**  
Commercial Director,  
ANA - Aeroportos de Portugal



**MARICEL SILVA**  
Senior Coordinator  
for Social Affairs, Lima  
Expresa motorway, Peru



**RODRIGO TAVARES**  
Environmental Manager,  
Salvador Bahia airport,  
Brazil

# Interview

**NICOLAS NOTEBAERT**

**CHIEF EXECUTIVE OFFICER OF VINCI CONCESSIONS  
PRESIDENT OF VINCI AIRPORTS**

**ANSWERS QUESTIONS  
FROM EMPLOYEES**





As we enter a new decade that promises numerous challenges for the mobility sector, Nicolas Notebaert spoke to some of the people who work on the ground building and operating the VINCI Concessions network every day. Their far-reaching and engaging conversation covered topics such as the environmental transition, trends and developments in the customer experience, and the concession model.

**NICOLAS NOTEBAERT:** Looking back at 2019, what strikes me most is just how central a talking point mobility was in society. There is a huge need for travel; our network is proof of that. In 2019, VINCI Airports grew passenger numbers by 5.7%, VINCI Highways increased the number of vehicles using the network by 5.6%, and the South Europe Atlantic high-speed rail line (SEA HSL) attracted more than 20 million people. Although the world is hungry for more connections, travel and trade, the subject of mobility also sparks debate. Travellers are more than just passengers — they are citizens who are asking themselves very important questions about the worth of mobility as an economic model and its role in the environmental transition.



**NICOLAS HÉLAS-OTHENIN**

**How can we place this civic-minded passenger at the heart of our strategy?**

**N.N.:** Passengers have always been key to how we design, build and operate transport systems. They are an essential focus for us. For example, our efforts at Salvador Bahia airport in Brazil have set a benchmark in terms of environmental sustainability; and under our leadership, Lyon became the first French airport in 10 years to win the ACI EUROPE Best Airport Award, which is more good news for



FRANCISCO PITA

**Competition for infrastructure is increasingly fierce. Where does VINCI Concessions stand?**

**N.N.:** We set new records in 2019. VINCI Airports generated managed revenue of €4.9 billion and continued to attract ever-greater numbers of passengers, handling a total of 255 million — including almost 60 million in Portugal, boosted by the many new routes we have opened. At VINCI Highways, the size of our network — over 3,500 kilometres of road in 14 countries — makes us one of the leading operators in the sector. These positions show that we inspire confidence and our expertise is highly sought after. Our partners choose us not only for our investment capacity and ability to bring about real action, but also to benefit from new solutions. They come to us because they know we understand their needs and how to satisfy them. That is how we continue adding to our portfolio of concessions while renewing and developing operations internationally.

passengers. In addition, we operate roads in Russia in a way that continuously improves safety for drivers. All of these projects demonstrate the effectiveness of our concession model. We must channel everyone's energy into addressing the environmental transition, safety and accessibility. That is why we are establishing public private partnerships.



MARIE-LOU PADILLA

**Are there specific targets that we must achieve, such as integrating new infrastructure into the network?**

**N.N.:** We first of all aim to fulfil the needs of our Group by renewing our concessions portfolio and expanding internationally. We completed the two largest airport acquisitions of the decade, securing Portuguese airports in 2013 and freehold ownership of London Gatwick this year. We also continued to establish ourselves in new locations in 2019, such as the Republic of Ireland and Texas, thanks to our expertise in free-flow toll technology. We are able to develop rapidly because we know how to successfully integrate new projects into our existing network. We are revitalising the industry and coming up with technological innovations. Moreover, we welcome new colleagues by recognising their expertise while opening new horizons to them through training, internal mobility and other opportunities. Our workforce also highly appreciates the VINCI Group employee share ownership plan. At Lyon airport, for example, which we have been operating since 2016, nearly 90% of our employees have decided to become shareholders!



ABHI CHACKO

**Our ability to innovate is one of our strengths. How could we do more and increasingly focus on researching new ideas?**

**N.N.:** Our new centres of excellence for Innovation will help by considerably stepping up momentum. London Gatwick, Lyon, Lisbon, Lima and Bordeaux—Villognon have all been tasked with trialling and implementing new ideas. When successful, we will deploy them at other infrastructure in accordance with their specific needs. This process of adapting solutions to new environments is only possible in a network. By taking this approach, we always stay one step ahead. Our infrastructure network is one of the most diverse in the industry. In this rich landscape, new projects

flourish — like the robotic valet parking system already in service at Lyon airport and soon to be rolled out at London Gatwick, and predictive maintenance on the SEA HSL. Our innovations help further the environmental transition. For example, the SunMind project, an intrapreneurial start up incubated by VINCI Concessions, presents enormous potential to continue harnessing solar energy to become self-sufficient.



CURTIS KOSKIE

**Speaking of the benefits of working as a network, how does VINCI Concessions develop synergy with other VINCI entities?**

**N.N.:** The greatest examples of this are our major projects, such as the Regina Bypass in Canada. In this extraordinary project, we were able to deliver the infrastructure on schedule by leveraging synergies with other VINCI Group entities — Eurovia through its Carmacks subsidiary, VINCI Energies and VINCI Construction through Soletanche Freyssinet, and VINCI Construction Terrassement. And we continue to do so, as VINCI Highways and Carmacks manage the motorway bypass as a partnership in this same vein. The same is true for the airports of Salvador Bahia, where we are working with VINCI Energies to carry out renovations, and Santiago de Chile, where we are building a new terminal with VINCI Construction Grands Projets. Every project presents its own challenges, and we provide the most effective solution to best suit every situation; that is how we are able to create synergies. We will continue leveraging this approach in 2020 at the Belgrade and Sihanoukville airports.



BOCHRA HAMMOU

**Looking at our internationalisation, in which parts of the world do you think VINCI Concessions should gain a foothold?**

**N.N.:** Our international presence is probably one of our greatest strengths today. We have established ourselves in diverse locations, operating not only in major stable world economies like the EU, the UK, Canada, the US and Japan, but also in strong growth markets such as Eastern Europe, South East Asia and Latin America. This balance provides us with both stability and momentum. Clearly, we must continue pursuing this strategy, as there is a global need for mobility. Mature economies will continue improving their infrastructure, like our modernisation of the A7-2 motorway in Germany and airport renovations in the Kansai region of Japan, while emerging economies seek to fill in the gaps in their networks in order to increase capacity and create connections, as demonstrated by the projects to expand Belgrade airport in Serbia and the Bogotá—Girardot motorway in Colombia. We employ our concession model and different areas of expertise — investment, programme management and operations — to meet the exact needs of every situation.

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**“Public-private partnerships are driving the transition to sustainable mobility”**



NICOLAS NOTEBAERT



# “As a leading provider of mobility services, we are rising to the challenge of the environmental transition”



NICOLAS NOTEBAERT

We are going to further step up change in this area. VINCI Concessions has adopted three goals to achieve between now and 2030: halve water consumption per work load unit, eliminate waste sent to landfill and halve gross CO<sub>2</sub> emissions. Meanwhile, VINCI Airports is also working towards reaching net carbon neutrality by 2050. We've taken measures to effect change across the industry, such as encouraging airlines to opt for more modern and energy-efficient aircraft by introducing landing fees that are adjusted according to their carbon footprint. Another reason to feel optimistic is our ability to apply our vision of sustainability to all infrastructure under our management. Knowing how to manage change is crucial, and we achieve this in very distinct countries. Not only have you seen this in action, you made it happen when we renovated Salvador Bahia airport in Brazil and the Kansai airports in Japan. In both cases, the infrastructure developed rapidly; teams and stakeholders truly believed in the project and produced solid results. We aim to make mobility more sustainable all over the world, and we are very proud of this important goal.



MYLÈNE LEULLY

## Which trends do you predict will influence our business lines in the future?

**N.N.:** I will try to answer in just one sentence, but it won't be easy because it's such a broad topic! Here goes: ever-smarter and more resilient infrastructure; an increasingly harmonious and sustainable passenger experience; and smooth management of rapidly growing traffic. We are already working in these three key areas by developing biometrics, trialling artificial intelligence solutions and rolling out free-flow road mobility projects. These trends apply to a variety of situations because we operate in a variety of regions, but they will nevertheless shape the future of our business.



RODRIGO TAVARES

## One of the trends for the future is travellers' high expectations regarding the environment. How can we respond to that?

**N.N.:** First of all, I think we should be clear about the fact that this is not a new issue in 2020. We launched an integrated environmental strategy at our airports in 2015 — the first operator in the world to do so. We have fully committed to the environmental transition, already reducing the carbon footprint per passenger at our airports by 35% over the last five years, and achieving carbon neutrality at three of our airports.



MARICEL SILVA

## What do you hope to achieve in terms of diversity, equality and inclusion?

**N.N.:** We are an international company and we promote the employment of local people, so diversity is at the core of everything we do. It is both an aim and an asset that enriches our expertise, methods and understanding of different markets and our clients' expectations. Increasing the proportion of women in our business lines needs to be a key focus. This is something we have been working on for a number of years and we are making progress, particularly in management positions. We are also actively working to increase the proportion of women throughout the Group. This inclusive approach is similarly demonstrated by the VINCI Group initiative, Give Me Five, which gives young people the opportunity to learn about future career prospects in our business lines. Mobility is the economic industry of the future where everyone, no matter where they are from, will be able to find their ideal opportunity. It brings about economic, technological and societal innovations and is a powerful way of transforming the world. ■



**ANNE LE BOUR**  
Director of  
Communications  
and Innovation

**PIERRE-YVES BIGOT**  
Human Resources  
and Sustainable  
Development Director

**NICOLAS NOTEBAERT**  
Chief Executive Officer,  
President of  
VINCI Airports and  
VINCI Highways

**OLIVIER MATHIEU**  
Executive Vice President

**CHRISTOPHE PÉLISSIÉ  
DU RAUSAS**  
Executive Vice President,  
CEO of VINCI Railways

## *A cooperative team* committed to positive mobility

The members of the VINCI Concessions Management Committee work together to foster the conditions necessary to grow VINCI Airports, VINCI Highways and VINCI Railways. They also ensure the company's infrastructure has a positive impact and supports long-term growth in the communities it serves.

Under the leadership of Nicolas Notebaert, VINCI Concessions' governance combines expertise in three key areas: airport, highway, and railway projects. In line with the VINCI Group's strategic positioning, the Management Committee promotes cross-company and internal synergies to disseminate the Group's culture throughout the world as it pursues international growth. With an agile and efficient organisation built around our skills, we draw on our know-how in designing, financing, building and operating mobility infrastructure and bringing about the environmental transition to drive momentum in regional economies throughout the world.



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POSITIVE MOBILITY MAKERS

# Protecting the planet



**JEAN-PIERRE SARDIN**

President of the Environmental Observatory, SEA high-speed rail line, LISEA, France

"Environmental offsetting has never before been undertaken on such a huge scale and over such a long period of time. We are working with living things, which means we had to develop an entirely new approach to infrastructure"







**RODRIGO TAVARES**

Environmental Manager, Salvador Bahia airport, Brazil

“Positive mobility and sustainability go hand in hand. It is one of our most important objectives to strike a harmonious balance between air travel and environmental protection”



**VALENTINA GONZALEZ**

CSR Project Manager, Via 40 Express, concession holder of the motorway between Bogotá and Girardot, Colombia

“To ensure we have a positive impact on communities, we need to take a sustainable approach to mobility. We believe positive mobility also has to factor in inclusion”





# SUSTAINABLE travel

## IS A REAL POSSIBILITY!

The environmental transition is one of the greatest challenges the transport industry will face in the coming years. The key players in mobility are aware that the future is being shaped by the decisions made today, which is why they are taking action. We can already travel better and more sustainably, and things will only improve as time goes on. A revolution is underway and VINCI Concessions is eager to lead the way.

### Working towards net zero emissions

VINCI Concessions has set itself a goal to halve its carbon footprint by 2030 and VINCI Airports is playing a key role in making that happen. We were the world's first airport operator to implement an integrated environmental policy, and we are already starting to feel the impact. For example, the airports in our network now emit 35% less CO<sub>2</sub> per passenger than they did five years ago, and three airports have already achieved carbon neutrality: London Gatwick, Lyon and Guanacaste. With our experience in change management, any airport we integrate can look forward to benefiting from our environmental expertise. Salvador Bahia airport in Brazil, operated by VINCI Airports since January 2018, has become a benchmark in terms of environmental sustainability.

### Promoting energy efficiency and biodiversity

To achieve tangible results, we have to make progress on all fronts. On top of reducing CO<sub>2</sub> emissions, VINCI Concessions is working to more than halve its water consumption per passenger and is aiming to send zero waste to landfill. All our entities have improved waste

sorting practices; London Gatwick, for example, has an onsite waste management plant, as well as a biomass boiler that transforms organic waste into energy. Given the extensive space our projects and infrastructure occupy, we have a responsibility to aim for the highest standards in protecting biodiversity. That is why VINCI Concessions set aside 3,700 hectares of land for environmental offsetting when building the SEA HSL, working within detailed specifications for each different type of plot.

### Innovating across the board

Infrastructure cannot offer all the solutions, and VINCI Concessions is determined to be a driving force pushing the industry towards sustainable mobility. Aviation will kick-start the change. VINCI Airports is planning to adjust the landing fees it charges to airlines using its network as a way to incentivise them to use low-emission aircraft. This is an example of how we can support the entire sector through the environmental transition.



## Three questions put to Rachel Thompson

Sustainable Development Director,  
London Gatwick airport, United Kingdom

**“Our recycling and reuse rate is now one of the highest of all the airports in the world”**

### **How is the waste management strategy in place at London Gatwick airport setting a new standard and stimulating innovation?**

**R.T.:** We are developing an approach built around the circular economy, meaning we try to recycle as much waste as possible. The impact is plain to see; our recycling and reuse rate is now one of the highest of all the airports in the world. We set ourselves the target to recycle 70% of waste by 2020 and we achieved it ahead of schedule. Our success comes from many years focusing on the issue. We have made some considerable investments, like the waste management plant opened on site with DHL.

### **What is actually recycled?**

**R.T.:** We recycle a huge variety of waste, such as paper cups, plastic bottles, cans, tins and paper. We even recycle any clothes and bags passengers leave in bins. Our onsite waste management plant gives us a distinct advantage as we are able to sort waste more effectively and recover objects like coffee cups that still contain liquids, which third-party contractors normally just throw away. We recycle 3 million every year! Items that cannot be recycled, like food waste, are separated, turned into a dry-powdered organic material and incinerated in our biomass plant, which generates up to 4.75 million kWh to heat the site. It's a truly virtuous circle.

### **What are you looking to do going forward?**

**R.T.:** We want to go even further and become a zero waste airport. We will achieve this by improving every stage of the waste management process. There's always something we can do to make a difference, whether in logistics, the passenger experience or the environment. It's an innovation-focused mindset that we share with the entire VINCI Airports network. We can also identify other ways to improve by sharing information and best practice throughout the network. ■





# Colombia

## The road to hope

In partnership with the Colombian Red Cross Society and the International Organization for Migration, VINCI Highways subsidiary Vía 40 Express has set up the Vía Esperanza initiative to help refugees from Venezuela as they travel through Colombia. Read on to learn more about the project, which combines humanitarian efforts and road safety.

They walk down the road alone, in groups of two or three, or sometimes even entire families with very young children. Now a familiar sight to Colombians, these people are fleeing the economic and political crisis in Venezuela. Referred to as 'walkers' by the public and the national press, they travel in uncertain and dangerous conditions.

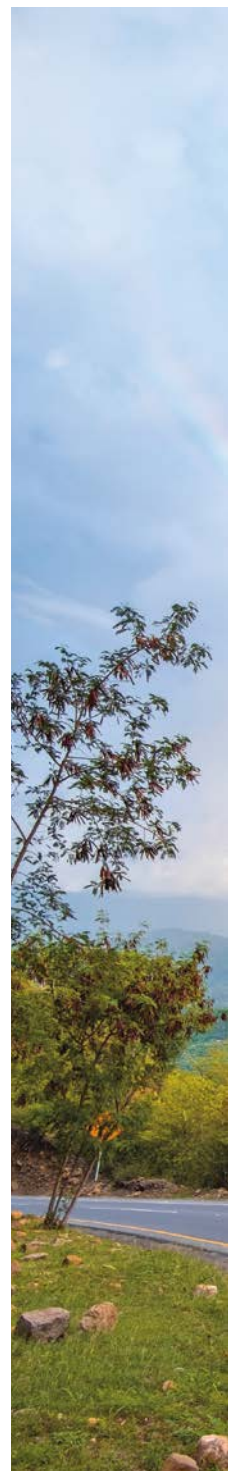
### Multi-faceted assistance

Vía 40 Express, a subsidiary of VINCI Highways and concession holder of the Bogotá–Girardot motorway, decided to make a positive impact by creating Vía Esperanza, a site set up specifically to provide assistance to these refugees. The Red Cross and the International Organization for Migration quickly recognised the project's worth and offered their support. The initiative provides food, internet access and areas to rest with books and games for children, and also conducts clothing drives.

But Vía Esperanza is not just about offering material aid; it is also a space for dialogue and communication with the three organisations — crucial for the refugees, who have limited access to information about the opportunities available to them in Colombia.

### Promoting safety

Through Vía Esperanza, VINCI Highways is also enhancing road safety for both refugees and drivers. The teams on site remind road users of the relevant safety guidelines in an approach that is both humane and practical, expressing the deep-rooted commitment of VINCI Concessions and its subsidiaries to the regions in which they operate.





### **OFFERING SUPPORT AND GUIDANCE**

People fleeing the economic and political crisis in Venezuela can be seen on the Bogotá—Girardot motorway every day. Vía 40 Express, a subsidiary of VINCI Highways and concession holder of the motorway, decided to help by creating Vía Esperanza.





## IN THE SPOTLIGHT



### FRANCE

## SEA HSL assesses its environmental performance

The Environmental Observatory of the South Europe Atlantic High-Speed Rail Line (SEA HSL) met in November, producing a favourable assessment of the measures taken to reduce and offset any impact of the line on wildlife, plants and natural habitats. The results are particularly positive for two of the region's most emblematic creatures — the little bustard and the European mink. The situation has much improved for the mink since special measures were implemented to enable the animals to safely cross the railway line. Various studies also highlighted the improvement of botanical knowledge, the success of the bat boxes put in place and the integration of the railway line into the landscape. These environmental measures will continue to be assessed in order to measure their medium- and long-term effectiveness.



### BRAZIL

## Salvador Bahia goes green

**After implementing VINCI Airports' best environmental practices, Salvador Bahia has now become one of the most environmentally friendly airports in Brazil.** ACI-LAC, the regional office of Airports Council International for Latin America and the Caribbean, presented the Green Airport Recognition award to Salvador Bahia to commend the energy efficiency, wildlife management and effluent treatment processes it has put in place. For example, the airport replaced 1,200 conventional light bulbs with LEDs, reducing its lighting-related energy consumption by 30%. In addition, a photovoltaic power station will go into operation at Salvador Bahia at the beginning of 2020 to generate power for the airport. The airport has also made significant investments to facilitate the treatment and reuse of all wastewater, waste sorting and the protection of local wildlife, reducing avian collisions in particular by 80%.



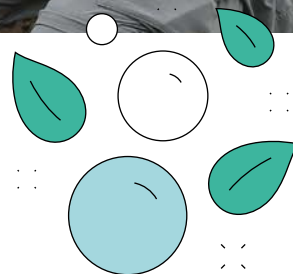
PERU

## Lima: driving solidarity, commitment and responsibility

VINCI Highways, which operates the concession of the expressways in Lima, sought to integrate the infrastructure into the geographical landscape and social environment. Lima Expressa recorded a drop in CO<sub>2</sub> emissions of almost 10% between 2018 and 2019, despite opening Section 2 in June 2018. In addition, neighbourhoods and communities benefit from associated responsible initiatives, notably through the development of social, sports and educational programmes focused on road safety. It's a sustainable development strategy that furthers Lima Expressa's commitment of providing safe, congestion-free expressways to 180,000 vehicles every day in the Peruvian capital.

# Zero

fertiliser used  
and waste sent to landfill:  
VINCI Concessions' target  
for 2030

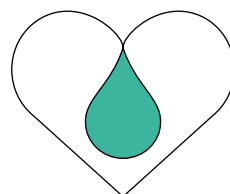


21



# 51%

reduction in gross emissions:  
VINCI Concessions'  
target for 2030

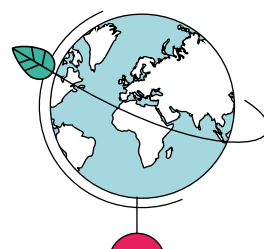


# Zero

net emissions:  
VINCI Airports'  
target for 2050

# 1st

airport operator  
to launch a worldwide  
environmental strategy  
in 2015



# Boosting

## regional growth



**GALINA ERDELI**

Road Operations Customer Service Manager, UTS, Russia

"By connecting two major cities like Moscow and Saint Petersburg, we bolster trade and develop social and economic ties between the two. We're creating value"







**SENKA JELENKOVIC**

Chief Administrative Officer, Belgrade Nikola Tesla airport, Serbia

"We are improving the connectivity of our country to the rest of the world and creating jobs locally. It's beneficial all round, with a positive impact on the population as a whole"



**MINGHUI CHEN**

Head of the Socioeconomic Observatory, SEA high-speed rail line, LISEA, France

"Mobility drives regional development. It amplifies positive trends by stemming brain drain, accelerating urban development and residential housing, and attracting companies able to create jobs"



# The M11 Neva

## A key resource to drive trade

The two final sections of the M11 motorway — named Neva — were inaugurated in 2019, completing the link between Moscow and Saint Petersburg. The achievement of this major project facilitates trade between the two nerve centres of the Russian economy, marking a new stage of the long-term partnership between VINCI Concessions and the local authorities.

Sergei Ivanov has been driving on section 8 of the M11 motorway every Monday since it opened in November. By making this journey every week, the Moscow resident — who works in Saint Petersburg once a week — is, without realising, fulfilling one of the deepest wishes of Peter the Great. Since founding Saint Petersburg in 1703, the tsar wanted to build a road to seamlessly connect the new city to Moscow, its “sister” with which the relationship has alternated between comradeship and rivalry throughout Russian history. VINCI Concessions and its partners brought this vision to life by designing, financing and building three of the eight sections of the motorway.

### Journey times halved

Sergei's 669-km journey between Russia's two largest cities now takes just five and a half hours instead of the nine plus hours required previously. VINCI Concessions and its partners inaugurated the last two sections of the motorway — sections 7 and 8, which lead into Saint Petersburg — in November 2019 after four years of

construction and investments of €1.6 billion. Russian President Vladimir Putin opened the M11 Neva, named after the river crossing Saint Petersburg and flowing into the Baltic sea that has contributed to the city's economic growth. Now completed, this new infrastructure significantly improves daily mobility for local residents and optimises trade between the two nerve centres of the Russian economy.

— CONTINUED PAGE 26







↓  
**A NEW ROAD  
TO EXTEND THE REACH  
OF THE RUSSIAN ECONOMY**

In addition to improving conditions for drivers, the new M11 motorway is extending the reach of the Russian economy and helping integrate its network into international transport systems.





— CONTINUED PAGE 24

### Heightened national appeal

The M11 Neva not only helps drivers; it is also contributing to extending the reach of the regions through which it passes. It is a valuable asset for forging solid relations outside Russia as it makes it easier to integrate the country's motorways into international transport systems, particularly the road networks of Northern Europe. The M11 will therefore help develop trade and boost the appeal of Russia, a country actively working to increase exports — particularly to the Netherlands and Germany, its largest EU trading partners. The connection with Scandinavian motorways leads to the German border, thus encouraging trade.

The M11 Neva therefore solidifies Saint Petersburg's position as a hub between Scandinavia, the rest of Europe, the regions of central Russia and the Baltic states. The city, where the head offices of many large Russian companies are based, continues to attract increasing numbers of foreign investors. By linking Saint Petersburg and Moscow, the M11 Neva will generate momentum that benefits the entire country.

### Safety and the environment, two main priorities

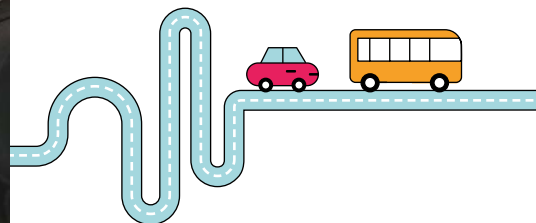
The Neva motorway is the result of VINCI Concessions' long term commitment to operations in Russia. The company

already holds the concession for the first section between Moscow's ring road and its biggest international airport, Sheremetyevo, which was delivered in 2014, and will now operate sections 7 and 8 until 2041 as part of a public private partnership. Although the central focus during the construction phase was protecting the environment — and plants in particular — the operation phase has positioned safety as the main priority. This is essential in Russia, where road traffic has grown significantly since the 1990s. The M11 Neva will also fuel innovation; in 2020, for example, it will be used to trial driverless vehicles.



### ← OPTIMISED TRADE

The Neva represents a new asset for the Russian economy, optimising trade between its two nerve centres, Moscow and Saint Petersburg.



### ↓ LONG-TERM OPERATIONS

VINCI Highways will operate motorway sections 7 and 8 under a public-private partnership until 2041.



# “A partnership based on innovation and anticipation”

**VYACHESLAV PETROVICH PETUSHENKO,**  
President of Avtodor (Russian Highways  
State Company)

“The M11 Neva successfully relieves congestion between Moscow and Saint Petersburg by bypassing the main city centres along the route. In addition, this new infrastructure has had a positive effect on the regional economy — creating employment and making the regions it passes through more appealing to tourists. Growing numbers of families use it to reach their holiday destinations, and road safety in particular has improved along the entire route between Moscow and Saint Petersburg.

The M11 Neva is an inspiring project for Russian mobility. The public-private partnership established with VINCI Concessions is one of the first of its kind in the country’s road sector. It enabled us not only to carry out this immense project in the shortest timeframe, but also to provide innovative services to drivers.

We have already identified a number of priorities for the future, such as maintaining the quality of the road surface — crucial given the severe local weather conditions — and building new rest areas, while upgrading existing ones. These facilities are essential for us to anticipate future traffic growth on this route linking two nerve centres of the Russian economy.” ■



## IN THE SPOTLIGHT



### FRANCE

## The SEA HSL is boosting the economy and mobility in the Nouvelle-Aquitaine and Occitanie regions

The initial impact of SEA high-speed rail line, 18 months after it was first commissioned, has been very positive, with increased traffic and greater prominence for the region. The line has surpassed its original projections, clocking up a 78% surge in traffic between Bordeaux and the Greater Paris region since 2017 and transporting over 50 million passengers since it was commissioned in July 2017. According to SNCF data, the SEA is the second busiest high-speed rail line in France, carrying over 20 million passengers in 2019. On average, over 85 trains a day travelled the line in 2019, 16% of which were fully booked. In addition, the new low-cost train service OUIGO, connecting Paris and Toulouse daily since July 2019, has attracted more than 300,000 new customers.



### FRANCE

## VINCI Airports boosting regions in France

Through both direct job creation and the revenue generated by travellers, the VINCI Airports network in France is key to boosting economic growth in the regions in which its infrastructure is based. According to a study by consulting firm Utopies, 90,000 jobs are supported directly or indirectly by the Rennes Bretagne, Dinard Bretagne, Nantes Atlantique, Saint-Nazaire, Toulon Hyères, Chambéry Savoie Mont Blanc, Grenoble Alpes Isère, Clermont-Ferrand Auvergne and Lyon airports.

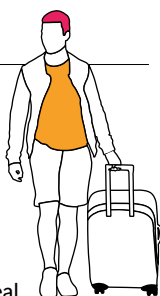




## SERBIA

# Serbian skies continue to open to new horizons

In line with the pledge made when it took over the concession for Belgrade airport, VINCI Airports wasted no time in its first year of operations, opening new international routes in and out of the Serbian capital. In 2019, Air France resumed its Paris-Belgrade flight six years after it was suspended, and the country's flag carrier Air Serbia opened nearly 15 new international routes. Belgrade will further expand its horizons as VINCI Airports carries out its expansion-modernisation project in 2020. Air-transport connectivity plays a vital role in boosting a country's standing on the world stage, as demonstrated when French President Emmanuel Macron and Serbian President Aleksandar Vučić came together to officially launch the expansion-renovation project in a kick-off ceremony in July 2019.



# 31 million

passengers at Lisbon airport in 2019 — proof of the destinations, increasing appeal

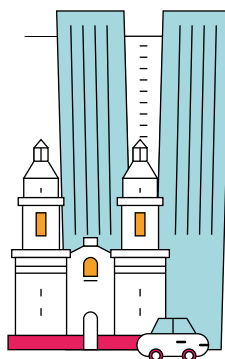


# 90,000

direct and indirect jobs supported by the VINCI Airports network in France (according to a study carried out for VINCI Airports by Utopies in 2017)

# 4.8%

more tourists in Bordeaux and the surrounding area, a destination served by the SEA HSL. According to the city's tourist office, 6.35 million nights in all types of accommodation were booked by hospitality operators in 2019



# 36<sup>th</sup>

Lima's position in the New York Times list of 52 Places To Go in 2020. It is the first time that the Peruvian capital — whose expressways are managed by VINCI Highways — has appeared in this list

# Building

the future



**JULIAN RAISON**

Head of Construction Support, London Gatwick airport, United Kingdom

"All our construction projects meet the highest environmental standards in terms of eco-efficiency, recycling and waste sorting"







**ANGELIKA WOLLENWEBER**

Operations and Maintenance Manager, A7 motorway, Germany

“Thanks to BIM solutions, the whole planning of construction works is now done in 3D. Afterwards, that information becomes a useful basis for operating the motorways”





# welcome

## TO THE AIRPORT OF THE 21<sup>ST</sup> CENTURY

In the future, the typical airport will be smarter,  
more efficient and entirely environmentally friendly.  
How is the VINCI Airports network preparing for the changes  
that will define the airport of the 21<sup>st</sup> century?  
Here is a look at those changes in detail.



### Creating a city within the city

"I'm going to the airport" is a phrase that will soon, perhaps, become a thing of the past. It will be replaced by, "I'm going to Gatwick/Saint Exupéry/Burbank/etc." because airports are gradually becoming destinations in their own right, as hubs of business and leisure. Infrastructure will also play an increasingly active role in urban development projects by providing opportunities for businesses, housing, shopping centres, event venues and more besides to set up shop. We have brought about this transformation by continually upgrading our sites to enhance accessibility, such as the ultra-connected air, rail and road network in place at Lyon airport.

### Increasingly smart, connected and efficient

The airport of the future will also represent a dense hub of technologies. Biometrics, for example, will become central to ensuring that greater passenger volumes continue to enjoy a smooth experience. The Head of Innovation at London Gatwick, Abhi Chacko, pointed out, "this technology already exists, but we are going to see it gradually being used more. Travellers will be identified from check-in through to boarding and travel seamlessly within the airport, enjoying customised services." This identification system could be successfully rolled out at all of the airports in the network or across all of an airline's routes. "Passengers will be able to decide whether or not they want to share their data," explained Abhi Chacko. Artificial intelligence — in the form of an increasing number of chatbots — will provide travellers with helpful information in real time. Robotics will also play a role, handling baggage and parking cars — a solution that is already a reality at Lyon-Saint Exupéry, and will soon be rolled out

at London Gatwick — not to mention the exoskeletons that VINCI Airports introduced in Japan in 2019, which make work less strenuous for ground teams by helping them carry heavy loads more easily.

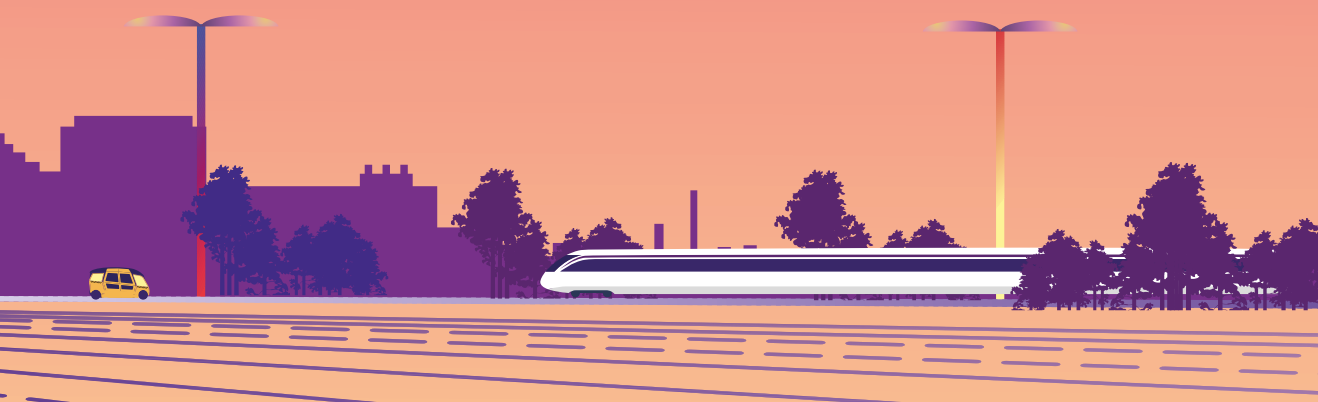
The way airports are organised will also enhance fluidity. "If we share information better between airports, we can optimise flight plans and therefore reduce wait times on the ground," said Abhi Chacko.

### Sustainable and responsible

It is possible to make airports destinations in their own right while also responding to the urgent need to protect natural areas by intelligently using existing resources to grow the business without losing productivity. Some early examples of this can be seen in Lisbon, where the Portuguese government is planning to reconvert the Montijo military air base into a civil airport, and at London Gatwick, where teams are looking at bringing the Northern runway — currently a standby runway — into routine use.

### An airport with net zero emissions

Net zero emissions and zero waste will be the two ultimate priorities for the airport of the future. Already a priority for VINCI Airports (see p. 16), recovering and recycling waste will also become standard practice. Other solutions set to be rolled out widely in the future include the use of electric vehicles for shuttle services and wastewater recovery systems. In addition, three airports in the VINCI Airports network — Lyon, London Gatwick and Guanacaste — are already carbon neutral. According to Abhi Chacko, "carbon neutral airports are the future. It's yet another aspect of innovation."





# Japan

## Major works under way as the Kansai region opens up to the world

VINCI Airports is paving the way for greater numbers of travellers from around the world as the region gears up to host international events and attract more tourists. The renovation of Terminal 1 at Kansai airport and Osaka Itami airport will expand capacity and improve the passenger experience.

In a nutshell, the major development work carried out on Terminal 1 at Kansai airport is about thinking big and looking to the future. The project is the largest ever undertaken at the airport in 50 years and has two aims: to accommodate the growing numbers of international travellers and create a new look for this “first pavillion” that visitors experience as they arrive in Osaka for the World Expo in 2025.

The renovation will take five years and be completed in Spring 2025, just before the Expo opens in April. The project will make more room for international passengers by reconfiguring the domestic flight zone. As a result, Terminal 1 will be able to accommodate nearly 30 million international passengers per year, compared with the current capacity of approximately 20 million per year. International and domestic flights in and out of Terminal 1 each year currently account for 24 million passengers. Kansai airport’s total international capacity, T1 and T2 combined, will increase to 40 million once the renovation has been completed.

### A positive travel experience

The renovation work also offers an opportunity to take a more in-depth look at the customer experience. The goal is to make time spent at the airport a unique blend of

discovery and relaxation. Top priorities of course include making passenger flows through the airport smoother and simplifying journeys for travellers, namely by taking advantage of technological progress in biometrics. But the project also aims to reimagine what an airport can be, creating a true destination in itself. Travellers will have several areas at their disposal designed to satisfy a variety of interests and needs, be it zen, curiosity, inspiration — the list goes on. They will enjoy new relaxation areas and a 60% larger retail area in order to offer even more services. Yet VINCI Airports will remain faithful to its “sense of place” philosophy, maintaining an authentic Japanese atmosphere in the terminal, namely through its decor and dining options.

### Sights on Osaka

The complete transformation of the Osaka Itami airport will be officially inaugurated in July 2020, proving VINCI Airports’ long-term commitment to Japan alongside its local partner, ORIX. We paid special attention to the design of the retail and dining options set up around an attractive, open forum. In total, over 31 new business will open their doors at Itami.



↓  
**RENOVATING  
THE TERMINAL  
AT OSAKA ITAMI**

The site will offer new retail and dining options set up around an attractive, open forum.



35

POSITIVE MOBILITY MAKERS



←  
**ACCOMMODATING  
GROWING NUMBERS  
OF TRAVELLERS**

Kansai airport is renovating Terminal 1 to prepare for the World Expo in Osaka in 2025 and accommodate growing numbers of international travellers.



## IN THE SPOTLIGHT



### SERBIA

## Belgrade, the future sustainable hub of Eastern Europe

In 2020, VINCI Airports will begin a total transformation of Serbia's Belgrade airport. Over the next 25 years, a total of €730 million will be invested to renovate and expand the terminal as well as construct new airport access roads and aircraft parking. The project, conducted in collaboration with VINCI Construction Grands Projets, will also provide an additional 3,500 metres of runway and upgrades to the taxi area. The goal is to increase airport capacity and make Belgrade a new Eastern European hub that's ahead of the green curve, as the investment will also cover the construction of a wastewater treatment facility, a recycling centre and a waste management plant.



### PORTUGAL

## Sustainable expansion in Lisbon

In Portugal, VINCI Airports will answer the Portuguese government's call to use Portugal's existing infrastructure to increase airport capacity in Lisbon.

As a way to limit both land use and the environmental impact caused by new construction, the Montijo military air base, 25 kilometres from the city centre, will be reconverted into a civil aviation hub.

In addition to using existing infrastructure, the reconversion project will also involve an ambitious environmental strategy. VINCI Airports will invest over €1 billion between now and 2028 in this project and the modernisation of Humberto Delgado airport in order to accommodate and encourage the growth of tourism in the Portuguese capital.

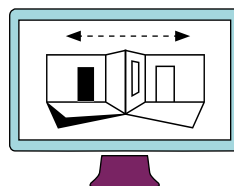




## GERMANY

# A smart worksite on the Via Niedersachsen motorway in Germany

Concession holder since 2017 of the A7 Via Niedersachsen that links Bavaria to the Port of Hamburg, VINCI Highways is working with Eurovia to modernise and widen the motorway. This strategic corridor is used by 70,000 vehicles per day, including 10,000 heavy goods vehicles. A 29.2-km section will be replaced with a three-lane dual carriageway, and to prepare for tomorrow's traffic flows today, the 3D modelling system — so instrumental during construction — will continue to serve throughout the operation phase. Sensors embedded directly in the road surface will transmit data in real time to future maintenance teams, allowing them to carry out smaller-scale interventions as infrastructure changes over time to guarantee high standards in the long term.

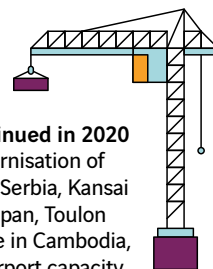


# 1st

full BIM road project in Germany and full BIM airport in Chile  
Digitised programme management for smarter infrastructure

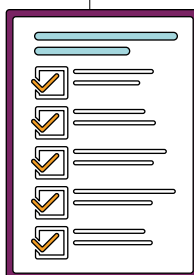
# 10

major projects launched or continued in 2020  
Construction, extension and modernisation of the following airports: Belgrade in Serbia, Kansai International and Osaka Itami in Japan, Toulon Hyères in France and Sihanoukville in Cambodia, as well as expansion of Lisbon's airport capacity, construction of a new slip road for the Prado tunnels in Marseille and the continuation of projects at Santiago airport in Chile and on the A7-2 motorway in Germany



# 5

major projects delivered in 2019  
Construction, extension and modernisation of Salvador Bahia airport in Brazil, the Regina Bypass in Canada, sections 7 and 8 of the Moscow—Saint Petersburg motorway in Russia, eight sections of the Bogotá—Girardot motorway in Colombia and the runway at Saint-Nazaire airport in France





# Opening

## new horizons

**FRANCISCO PITA**

Commercial Director, ANA - Aeroportos de Portugal

"Each new route we open is another string to our bow, boosting Portugal's appeal and economic growth. With the construction projects we have under way, we are preparing today for increased passenger numbers tomorrow"







**MARC GORDIEN**

Chief Commercial Officer, Salvador Bahia airport, Brazil

"We are keen to offer real opportunities for airlines and develop a complete partnership with them over the long term"

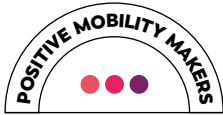


**PHILIPPE JAUSSEERAND**

Commercial Director, SEA high-speed rail line, LISEA, France

"The SEA high-speed rail line connects regional communities and is attracting more and more users. It is helping to expand trade at both the regional and national levels"





# “Portugal boosts international connections”

**FRANCISCO PITA**  
Commercial Director,  
ANA - Aeroportos de Portugal

Since 2013, Portugal’s airport traffic has more than doubled. The route development teams made a significant contribution to this achievement by opening new routes and bringing on new airlines. Francisco Pita, Commercial Director at ANA - Aeroportos de Portugal, was asked about how the teams from VINCI Airports help attract tourism to Portugal.

“If you want to understand the momentum of an economy, you should start by looking at its airport flight schedules. It seems to me you can paint a rather accurate picture of the situation by going through the list of departures and arrivals. I have often thought this to myself as I travel and it has proven true every day since I started working closely with airlines.

## **Connecting Portugal to the world — 73 new routes opened since taking over the concession**

The 73 new routes opened since VINCI Airports took on the concession accurately reflect the country’s momentum, and this trend doesn’t look like it’ll be slowing down any time soon. In 2019, Lisbon was connected for the first time to Doha with Qatar Airways, to San Francisco with TAP Air Portugal and to Seoul with ASIANA. Porto

started running regular flights from Dubai with Emirates and from Sao Paulo, Brazil with Azul Airlines — some of the most impressive intercontinental routes opened in a year in which seven new routes came to Lisbon and 10 to Porto. The most tangible results of key account management teams, who work closely with airlines, are obtained by encouraging our partners to open new routes and reinforce existing ones. But it’s not all about new routes. The ultimate goal is to ensure longevity, starting from day one. In addition to building solid business cases for new routes, our key account managers work in close collaboration with airlines, airport stakeholders and tourism boards.

## **Guaranteeing a high-quality passenger experience**

Each new route represents yet another asset to boost Portugal’s appeal and growth. When an airline establishes a base at an airport, as easyJet did in Porto in 2015 for example, it invests in its future development. It reflects a high level of confidence in the infrastructure but also in the economic potential of the region itself. We are also committed to investing the same energy into developing the retail services on offer at our airports.

The goods and services marketed in an airport are essential to guaranteeing a top-quality passenger experience. We strive to provide a retail offer that meets passenger needs and at the same time helps to foster a pleasant atmosphere at the terminals without compromising the ease and simplicity





of boarding and arrivals, therefore contributing to a generally positive and seamless airport experience.

To ensure passengers enjoy an ever-smoother journey, we are further investing in new technologies such as biometrics and big data analysis. Together, these efforts made Lisbon airport stand out as a clear choice to become one of VINCI Airports' centres of excellence for Innovation in 2019. At the start of 2020, Porto was named Best European Airport in its category for the 13<sup>th</sup> time at the ACI's ASQ Awards.

### **Looking to the future**

This strategy of international openness is not limited to our infrastructure; it radiates far beyond. The new routes contribute to the country's economic success, which makes me very proud of what I do. In 2019, air traffic at Portugal's 10 airports increased by 6.9% to reach nearly 60 million passengers, registering one of the highest rates of growth in the European market. Tourism has established itself as one of the most buoyant sectors of the national economy and the country's airports have played a very important role in this achievement.

Each airport has very specific appeal and attracts different kinds of passengers. Porto, for example, handles considerable numbers of tourists arriving in the country to set sail on cruises; Faro is the gateway to the popular Algarve region; the island of Madeira, which has been voted the World's Leading Island Destination several times at the World Travel Awards, continues to be a popular destination in key European markets; and the Azores Islands, where the untouched natural beauty of its landscapes is once again being rediscovered, are attracting not only visitors from Europe, but also North America. By developing each of these regions, we help inject momentum into the Portuguese economy and job market.

### **Preparing for future traffic growth**

I see this as a just another step along the way since the journey began in 2013. Air traffic has doubled over this period, and it's not about to stop there! This is just the beginning of a long-term commitment we have made to the country and regions served by our airports.

We are already studying and anticipating future developments across the Portuguese airport network. The existing Lisbon airport, for example, which already serves 132 destinations, is undergoing major expansion work. We will also respond to the Portuguese government's request to convert the military airport of Montijo, 25 km outside Lisbon, into a civilian airport. Capacity will therefore increase to meet the foreseeable growth in demand for air traffic in this region. Together, VINCI Airports and Portugal continue to write new chapters in their long history and beautiful shared." ■

# Creating a more open world



With new routes opening and connections within the network increasing, 2019 was an exciting year for VINCI Airports. These successes were achieved through the hard work of our business development teams and our unparalleled expertise in opening new routes.



お手洗  
Toilets  
男 女  
20 →





**VINCI Airports opened 325 new routes in 2019**, a figure that reflects not only our ability to boost regions' appeal and the strength of our partnerships with airlines but, most of all, the quality of our strategy to develop the potential of the airports under our management. These new lines respond to the ever-growing need for mobility all over the world. A number of headline "long-haul" connections opened in 2019, such as

Porto—Dubai with Emirates, Nantes—Dakar with Volotea, Santiago de Chile—Barcelona with Iberia, Lisbon—Doha with Qatar Airways and Guanacaste—Amsterdam with KLM. In addition, new routes reinforce the connections between airports within our network, including Lyon—Porto with TAP, Grenoble—Porto with Ryanair and Salvador—Santiago with JetSmart. These links improve connectivity, simplify processes and facilitate trade.



## IN THE SPOTLIGHT



### BELGIUM & FRANCE

## Thalys connects Brussels and Bordeaux

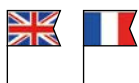
The success of the SEA HSL between Paris and Bordeaux made waves all the way to Brussels. That's why, in the summer of 2019, Thalys opened a new Brussels—Bordeaux service, connecting the two cities for the first time in just four hours and seven minutes. Passengers were on board, as trains were 94% full! The service will reopen in the summer of 2020, from June to September.



### FRANCE

## A new slip road in Marseille to increase mobility

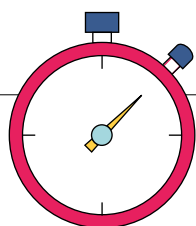
In 2020, VINCI Concessions subsidiary SMTPC, concession holder of the Prado Sud and Prado Carénage road tunnels in Marseille, will begin construction of an underground slip road directly linking the two tunnels with Boulevard Schœsling, a main thoroughfare through the city centre. The project totals 900 metres in distance, 500 metres of which will be new construction, freeing up the space needed on the street level to extend the T3 North-South tram line. The slip road will ease traffic and connect the city's southern and eastern neighbourhoods to other major transport hubs. Construction will go hand-in-hand with an urban landscaping project at the Place du Général Ferrié, where a green pedestrian and cycle path will be built.



UNITED KINGDOM & FRANCE

## Preparing the way for a direct train from London to Bordeaux

Plans are progressing for a direct service that would take up to 1.2 million travellers per year between London and Bordeaux in under five hours. Last June, London St Pancras and Bordeaux Saint-Jean stations were twinned; infrastructure managers LISEA, SNCF Réseau, Eurotunnel and High Speed 1 must now equip Bordeaux Saint-Jean with an international terminal to handle customs and security checks.

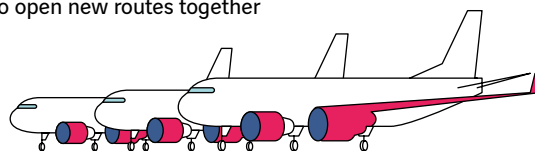


# 50 minutes

the time saved travelling between the centre of Lima and the airport enabled by the lack of congestion on the Lima expressways

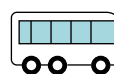
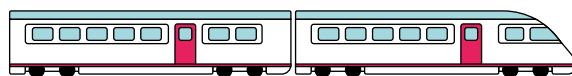
# 250

airline partners  
to open new routes together



# 94%

occupancy rate of the direct rail link  
between Brussels and Bordeaux,  
run by Thalys



# 5.5 hours

the time it takes to travel between Moscow and Saint Petersburg using the new M11 Neva motorway compared with over 9 hours previously



# Serving passengers



**MARIE-LOU PADILLA**

Customer Experience Operations Director, Aéroports de Lyon, France

"Optimising the customer experience should be our common focus. That is why we regularly get out in the field to trial our solutions and get feedback from users"





**JULIAN RAISON**

Head of Construction Support, London Gatwick airport, United Kingdom

“Travellers should get more and more enjoyment from their time spent at the airport. That is one of the key aspects of what we do”

**CURTIS KOSKIE**

Health and Safety Manager, Regina Bypass, Canada

“Operating infrastructure over the long-term means continually improving services. Every day, we go further and make progress”



Lyon

## France's Lyon airport takes ACI EUROPE top prize

In 2019, Lyon became the first French airport in 10 years to receive the ACI EUROPE Best Airport Award in its category. Only three years after joining the VINCI Airports network, Lyon won the prize as a result of its new corporate initiative and its teams' transformative work to improve the customer experience. Read on for a more in-depth analysis.

Lyon demonstrated its overall excellence in the dossier it submitted to the ACI. The airport stood out for its pioneering initiatives and impressive results, such as a rise in traffic of almost 30% in three years as well as connections to over 130 destinations, opening 52 new routes, welcoming 11 new airlines and becoming a base for airline Volotea from 2020.

Lyon has optimised the customer experience, making it one of its greatest strengths. In addition to the steps taken to personalise the customer journey, a number of other innovations were implemented, including the world's first valet parking robot. In 2020, this solution will be more widely used, and other airports in the network, like London Gatwick for example, are currently trialling the technology. This dynamic illustrates the VINCI Airports "test and learn" method, which ensures the best chance of success going from the trial phase to a broader roll-out across the network.

### Multimodal, efficient and sustainable

To further improve the passenger experience, Lyon launched in 2019 a new digital Market Place, which travellers can access via the airport's website or at the

interactive digital panels located in baggage claim areas. The platform allows them to purchase any tickets for parking or transport, such as buses or the Rhônexpress tram. Travellers appreciate the multimodal connections available at Lyon, as it is more than just an airport; it also combines a high-speed rail station, a Rhônexpress station connecting travellers to the city centre by tram and a bus station offering transport to over 30 cities, making it an exemplary air, rail and road mobility hub.

Operational excellence was another critical area recognised by the award. Lyon centralises all its entities, including third-party partners, in a single operations centre. This way, all information is collected in a central location and in real-time, enabling us to respond swiftly. We also monitor social media, making it even easier for us to stay abreast of passenger feedback.

Similarly, through our teams' exemplary commitment to the environment, the airport has made major strides in terms of sustainability. Lyon became carbon neutral in 2017 and the buildings, including the new 70,000 m<sup>2</sup> Terminal 1, are certified HQE, a high-quality environmental standard for green buildings in France.







### ↓ **AN INTERMODAL HUB IN LYON**

Lyon airport combines a high-speed station, a Rhônexpress stop connecting travellers to the city centre in 25 minutes, and a bus station offering transport to over thirty towns.



### ← **GROUND BREAKING INNOVATIONS**

For safety, simplicity and saving time, the new automated parking system tested at Lyon airport in 2019 is a world first. The solution is set to be rolled out at other airports in the network, such as London Gatwick.



# “Personalising our solutions by listening to customers”

**MARIE-LOU PADILLA,**  
Customer Experience Operations Director,  
Aéroports de Lyon, France

“Our approach to customer service is rooted in two key practices: listening to customers and personalising their experience. Families going on holiday don’t have the same expectations as people in business class travelling for work. That’s why we created options for families, such as a separate line at security, play areas, children’s menus in restaurants and more. Throughout the airport, families can easily find signs indicating where they can benefit from these services. Our aim was to provide a calmer, more pleasant airport experience, and it would appear we have done so as families have given us a 95% satisfaction rating. We’re also designing a Premium experience for business customers, leveraging truly innovative solutions, such as facial recognition to provide a seamless journey through the airport. We are looking to provide these types of customers with the smoothest experience possible. The trial phase will begin in June 2020 and a gradual roll-out will follow.” ■



# PROJECT Mona

## REINVENTING THE AIRPORT EXPERIENCE



A personal assistant to help passengers will soon be deployed as part of Project Mona. Developed by VINCI Airports and launched in the summer of 2019, this multi-channel programme combines a mobile app with interactive information points in airports. It leverages biometrics primarily to simplify travel throughout the passenger journey but also to eliminate all sources of frustration from the passenger experience, like time spent boarding. Project Mona means passengers will no longer need to go through the inconvenient process of showing their boarding pass and passport. They will enjoy a seamless experience through the airport and at security checks, from the moment they enter the building to when they take their seat on the plane.

### **A customised airport experience**

Mona will also make it possible to customise the airport experience. Before passengers arrive, they will be able to set up a notification to let them know when to leave for the airport depending on traffic. In the airport itself, Mona will give them tips on how to avoid queues and enable them to go through biometric passport control. Shopping deals will be tailored to passengers' individual preferences, in strict compliance with data protection principles. Passengers will be able to trial the service for the first time at Lyon airport in 2020. It will then gradually be rolled out to the rest of the VINCI Airports network in France and internationally.

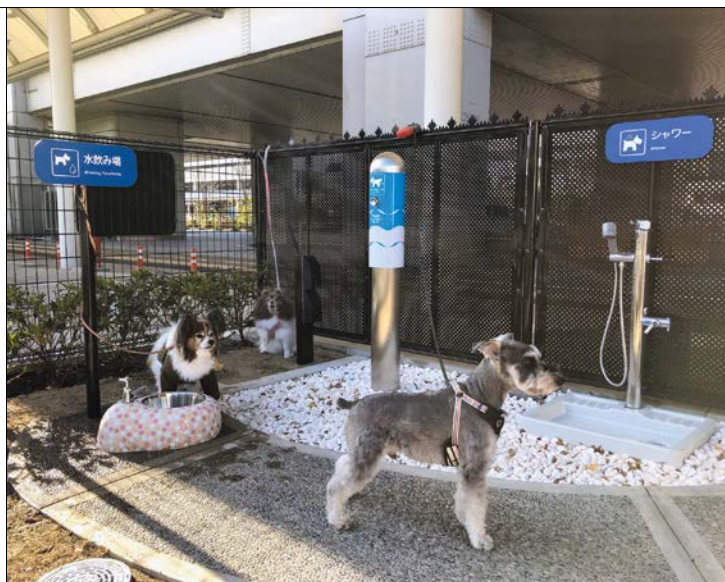
## IN THE SPOTLIGHT



### FRANCE & UNITED KINGDOM

## Improving customer service in airports with chatbots

In order to provide 24/7 customer service, London Gatwick has developed a chatbot that travellers can access via Facebook Messenger. Named Gail, it provides passengers with information on flights as well as shops, restaurants and other services on offer in the airport. The chatbot was the fruit of a successful collaboration within the VINCI Airports network between London Gatwick and Lyon airport in France, which launched its chatbot in October 2017. The collaboration primarily looked into conditions of use, frequently asked questions and the advantages of various features.



### JAPAN

## Osaka airport, top dog in passenger services

An optimised customer experience takes into account all passengers — even their animal companions! Osaka airport has further improved its already high level of services by creating a specific toilet area for dogs. The facilities can be accessed between the hours of 5:30 am and 10 pm and are located at the entrance of the airport, so they can be used ahead of boarding. It's a practical and convenient service for dog owners that is particularly appreciated by airlines.





## UNITED KINGDOM

### London Gatwick champions accessible mobility

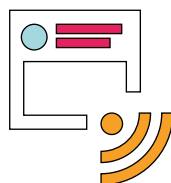
London Gatwick is working to improve accessibility in its airport by adapting its services for people with disabilities. For example, the airport has trained its teams in providing assistance for passengers with invisible disabilities such as autism.

It also introduced a system enabling passengers in need of assistance or extra time to make their needs known in a more discreet way. On top of that, the airport opened a lounge reserved for passengers with disabilities as well as a sensory space where passengers with conditions such as autism can decompress, the first of its kind in the UK. These efforts won the airport the EUROPE Accessible Airport Award voted by the ACI in partnership with the European Disability Forum.



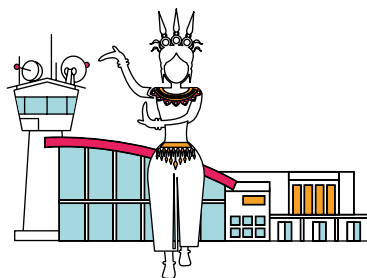
**100%**

of our airports offer free Wi-Fi



**65%**

increase in the number of subscribers to our e-mobility and digital road services, with 1.3 million active users at 31 December 2019



**15**

artistic partnerships in our airports in 2020, to make our airports showcases of cultural expression across the world and enrich the passenger experience



**More than 10**

international service quality awards won by our airport network in 2019



# Sharing expertise



**NICOLAS HÉLAS-OTHENIN**

Operations Manager and Digital Transformation Lead, SEA high-speed rail line, LISEA, France

“Through public-private partnerships,  
we can share our expertise to provide the public  
with effective, innovative infrastructure”







**MYLÈNE LEULY**

Director, Chambéry Savoie Mont Blanc airport, France

"To stay one step ahead, we have to share expertise wherever possible. That's what sets us apart"



**SANDRA FERREIRA**

Deputy Airport Manager, Lisbon airport, Portugal

"We're building positive mobility through continual dialogue with everyone in the industry, including airlines, local governments and suppliers"







## A PUBLIC-PRIVATE PARTNERSHIP DRIVING

# new ideas

## ON THE SEA HSL

Concessions and public-private partnership models have come to play a key role in mobility and regional development. That is how VINCI Concessions, through its LISEA and MESEA subsidiaries, became the private operator of a high-speed railway line – the SEA HSL running from Tours to Bordeaux, where this cooperation has revitalised performance and operations since it began in 2017. Nicolas Hélas-Othenin, the Operations Manager and Digital Transformation Lead at LISEA, went into the details.



The South Europe Atlantic High-Speed Rail Line (SEA HSL) between Tours and Bordeaux is, first and foremost, a success story. After just two years of service, the high-speed rail line is the second busiest in France, carrying over 20 million passengers in 2019 and an average of more than 85 trains per day. This commercial success stems from the solutions the line provides to address people's growing need for mobility. Moreover, its regularity rate is constantly improving, and reached 97% in 2019 — a result ultimately made possible by pooling experience.

**Innovation transfer to arrive at success**

Public-private partnerships offer key advantages such as experience sharing, innovation transfer and collaborative spirit, all of which have been leveraged to full effect on the SEA HSL. Nicolas Hélas-Othenin explained, “we were able to use our business lines’ operational expertise in collecting and analysing data to significantly develop the project. This has enabled us to effectively identify and

classify any incidents that take place on the line in order to quickly provide solutions.” In combination with artificial intelligence technology, this first phase opens up many opportunities to improve predictive maintenance of the infrastructure. For example, as Nicolas Hélas-Othenin pointed out, “we have developed track geometry deterioration models so we can anticipate and, in collaboration with MESEA, maintain a good level of service on the infrastructure.” Innovation is also used to enhance safety and performance. A specific example of this is the BROOM rail line inspection cars that enable MESEA to monitor the railway line each day before passenger trains start operating, using sensors to identify any anomalies. Nicolas Hélas-Othenin added, “all of these improvements are part of a long-term strategy in collaboration with our concession grantor, SNCF Réseau, as the SEA concession is set to run until 2061.”





# For airports in the Alps region, “synergy is key to success”

MYLÈNE LEULY, Director, Chambéry Savoie Mont Blanc airport, France

Chambéry Savoie Mont Blanc airport offers a perfect gateway to the Alps. It operates in close collaboration with the regional airports of Lyon and Grenoble Alpes Isère, and sometimes even nearby Toulon Hyères. Mylène Leuly, Director at Chambéry, discusses how these airports leverage synergies by pooling their expertise.

“My first thought when I became Director of Operations at Chambéry Savoie Mont Blanc airport in September 2019 was that this is truly an exceptional airport. Six months on, that first impression rings even more true today when you consider our location, our operational and commercial organisation, our teams — the list goes on. For 15 years, this airport has offered a unique gateway to the beauty of the Alps and the many

nearby ski resorts. Every year, our airport handles over 200,000 incoming passengers, primarily foreign tourists, 86% of whom are from the UK. This also makes Chambéry France’s third busiest airport for business aviation during the winter and the economic heartbeat of the region.

## **Lyon, Grenoble and Chambéry, a synergy triangle**

The airport’s busiest season is of course the winter sport season, which runs from December to April. That kind of calendar poses a real challenge for us, as every winter we have to start over in a way. To make sure we get it right, we have an ace up our sleeve — the synergy between the different airports that we operate in the region.

Lyon, Grenoble Alpes Isère and Chambéry airports operate like a triangle. Each airport is uniquely positioned in its market with diverse insights to offer. Lyon Airport received the ACI’s 2019 Europe Best Airport Award in its category and handles an impressive number of passengers from all over the world. Grenoble has invaluable experience in the ski market, and with the advent of low-cost airlines it sees a wide array of different kinds of travellers coming through its halls. We at Chambéry offer a fantastic location and services suited to





accommodate annual skier traffic.

The collaboration between the three airports is particularly beneficial when it comes to retail, but this is far from the only advantage. On a day-to-day basis, the synergies can aid operations, especially in finding solutions when bad weather causes problems for one of the airports. It's an undeniable advantage for us when it comes to guaranteeing the best possible travel experience.

**Supporting employment and the environment by pooling expertise**

Sharing knowledge and insights between the three airports allows us to think bigger in terms of regional development, which is reflected by our presence at major regional events such as the Grand Ski trade exhibition. We're also stronger together when it comes to employment. Every September, we start recruiting and training 250 seasonal workers in passenger services or as runway and maintenance personnel. They then have the option of working at Toulon Hyères Airport during its peak summer season, or finding positions at other VINCI Airports sites. New recruits benefit by gaining career prospects, and the overall quality of our services improves because we can hire trained staff who know the VINCI system.

**A solid, cooperative network — a major asset**

Pooling our expertise also helps to improve our environmental and sustainability practices. Chambéry airport is both a unique and sensitive site, as 78% of the total area is made up of green space that's home to 82 different bird species. That is why we are taking strong action to protect our biodiversity, moving away from pesticides, improving waste management and eco-efficiency — the list goes on. We share our solutions with other airports facing the same challenges, and in 2019 our approach produced its first tangible results, as Chambéry obtained ISO 14001:2015 certification after integrating the lessons learned by other airports.

This exchange of knowledge and skills is central to our development strategy. I find that it's an extremely effective way to keep improving services as well as motivating our teams. It allows our personnel to face the challenge of the winter season with a vast array of tools at their disposal because they are part of a solid and cooperative network. That is a major asset for us." ■

## IN THE SPOTLIGHT



### WORLDWIDE

## Uniting colleagues across the globe through ethics

As it rapidly expands its international footprint, VINCI Concessions is strongly committed to ensuring respect for ethics and compliance across its international operations. Training sessions are provided on the VINCI Group's Code of Ethics and Conduct as well as our evaluation criteria for third parties and partners, and we likewise rely on auditing and a whistleblowing system to guarantee that our principles become a reality in the 21 countries in which we operate. In 2019, over 1,400 employees working in 13 countries across Europe, Asia and the Americas received training either in person or online.



### UNITED KINGDOM

## Applying our expertise in opening new routes in London

Drawing on the expertise and knowledge we have gained in international markets, we were able to successfully launch a range of new services out of London Gatwick in 2019. London Gatwick worked closely with Air China in particular to open a new route to Shanghai. China Eastern Airlines, which was providing three direct flights per week to Shanghai, decided to increase its services and now runs a daily flight.



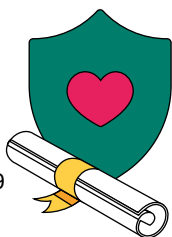
**WORLDWIDE**

## New e-learning platform for VINCI Airports Academy

To share our operational expertise with everyone in the network, VINCI Airports Academy offers training in management, the environment and safety. In 2020, the training centre will become even more connected as we roll out a brand-new e-learning platform, the Learning Management System (LMS). Using this tool, everyone in VINCI Airports Academy can access an extensive, shared library of training materials provided by both the user's local airport and other airports in our network, as well as a wide array of programmes offered by the VINCI Group and our other business lines.

# 1,350

workplace health and safety sessions organised across the VINCI Highways network in 2019



# 13,700

employees trained at VINCI Airports in 2019

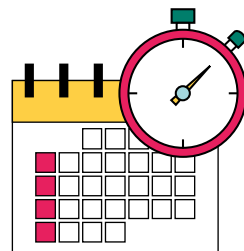


# 100%

accessibility, with a training catalogue and educational content that can be accessed by anyone, any time — soon to be rolled out by VINCI Airports Academy through its Learning Management System (LMS) programme.

# 12,000

hours of training provided by MESEA, operator of the SEA HSL, to its teams in 2019 — an average of four training sessions per employee





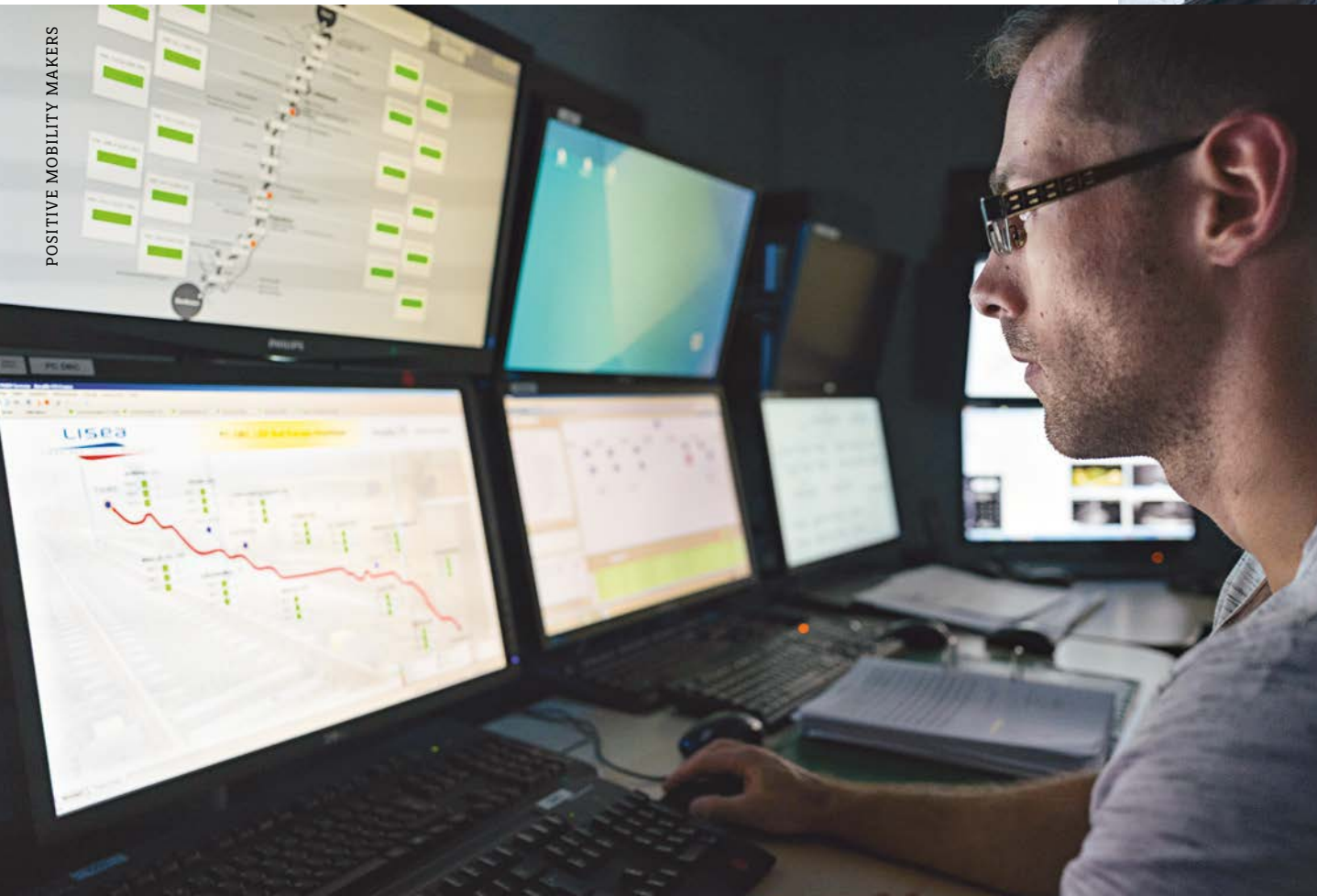
# Ensuring

safety



62

POSITIVE MOBILITY MAKERS



**CURTIS KOSKIE**

Health and Safety Manager, Regina Bypass, Canada

"We have to guarantee the safety of both our teams and passengers. It's a focus we have to maintain day in, day out"

**JEAN-BRUNO DELRUE**

Commercial Director, SEA high-speed rail line, MESEA, France

"Our workplace health and safety policy represents both a vector for social dialogue and a fantastic opportunity to foster trust around a subject that benefits everyone, which undeniably contributes to the success of the company"



# Regina

## Safe roads at last

VINCI Concessions built and now operates the bypass road around the city of Regina, Canada. As the first public-private transport partnership in the region, it was a truly exceptional project, carried out in synergy with several entities in the VINCI Group. Improvements in road safety reflect its success.

On 28 October 2019, the final section of the Regina Bypass opened in the presence of the Premier of Saskatchewan, marking the end of the largest ever infrastructure project in the province and its first public-private transport partnership. With an investment of C\$1.9 billion, the major works were carried out in extreme weather conditions. Construction was completed in just four years, facilitated in particular by synergies between several VINCI entities: VINCI Concessions and its subsidiary VINCI Highways, Eurovia through its Canadian subsidiary Carmacks, VINCI Energies and VINCI Construction.

teams haven't had to use their extrication equipment since the road project began two years ago.

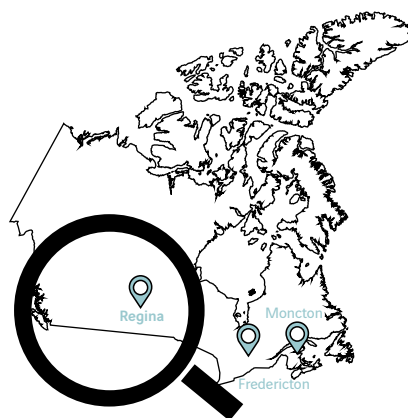
### Benefits to the economy

The Regina Bypass has also been good for the local economy. Saskatchewan is known as a major international exporter and the infrastructure bolsters this capacity. According to a study published by the Saskatchewan government, the new works will contribute over C\$940 million to the province's GDP. The bypass is paving the way to a brighter future.

### Immediate improvements to safety

To guarantee safety for drivers, better organising traffic flows became a priority. That is why VINCI Concessions and its partners upgraded 24 km of existing road and built 37 km of new motorway, 12 interchanges and 33 bridges and viaducts. Our integrated management system ensures quality, safety and environmental sustainability to offer the highest standard of operations on the road.

The new infrastructure and operating procedures have immediately produced positive results. Since Section 1 was commissioned in 2017, the number of accidents has already gone down significantly. Randy Schultz, Fire Chief of the nearby White City Fire Department, has noticed the difference, saying he and his

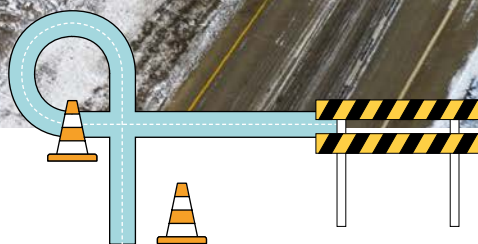






↓  
**SMOOTHER AND SAFER  
TRAFFIC FLOWS**

The construction and renovation of the Regina Bypass, as well as the creation of new interchanges, has significantly reduced the number of accidents since Section 1 was commissioned in 2017.



←  
**THE LARGEST  
MOTORWAY PROJECT  
IN SASKATCHEWAN'S  
HISTORY**

The final section of the Regina Bypass opened on 28 October 2019.



## Three questions put to Curtis Koskie,

Health and Safety Manager, Regina Bypass, Canada

**“Safety is a top priority for us, from the design phase to infrastructure maintenance”**

### **What is your main focus in terms of safety?**

**CK.:** We want to offer drivers a safe driving experience without congestion. Everything we put in place is intended to create the safest driving environment possible. From designing roads to daily maintenance, VINCI Concessions sees driver safety as a top priority.

### **How do you make safety a reality and not simply a goal?**

**CK.:** We do it by striving for excellence every day. We don't leave anything up to chance. Every day, our teams are on the ground carrying out inspections. We monitor the state of our infrastructure down to the last detail to try to find potential problems, and when we find a real problem, we do everything we can to fix it as quickly as possible. Safety is first and foremost a question of attention as well as communication. That's why we work closely with the Ministry of Highways and Infrastructure of Saskatchewan to ensure safe travel. The same goes for our internal operations. Communication is key. All our personnel need to know who to report information to so issues don't go unchecked.

### **How has the Regina Bypass improved the lives of people in the region?**

**CK.:** As the population increases, so does road traffic, and congestion then becomes a focus. The bypass offers an effective solution and has also helped to reduce accidents while pursuing sustainable development initiatives. We keep track of wildlife onsite and have reduced our use of salt for winter maintenance. These environmental considerations are a continuation of the commitments we made during the construction phase. This was our first public-private partnership in the region and can serve as a model for future infrastructure projects. ■

## TWO EMBLEMATIC PROJETS IN COLOMBIA AND CAMBODIA

# Ensuring safety during construction and operation

Every project is challenging, but some projects are more challenging than others, particularly when infrastructure remains open to users during construction, renovation or upgrade work.

In Colombia, VINCI Highways is extending and renovating the Bogotá—Girardot motorway. In the summer of 2019, it commissioned the first section of road between the cities of Soacha and Sibaté, the construction of which presented numerous safety challenges. The construction site was situated in a highly urbanised area through which 100,000 vehicles travel every day. This meant we had to work through the night to take advantage of the five-hour period when traffic is at its lowest. The intensity of the work made daily planning crucial, with over 1,000 workers operating at the same time. Through practical safety measures such as designated safe areas for mobile phone use, the project was completed in just nine months without compromising safety. To keep drivers safe, traffic management and communication was key to warning drivers when three lanes would be reduced down to one.

Our teams in Sihanoukville in Cambodia have also successfully risen to a different challenge, as annual passenger numbers at the airport have surged from 94,000 in 2015 to 1.6 million in 2019. To encourage this strong growth trajectory, VINCI Airports has launched several critical projects, including in particular work to extend the runway in order to accommodate long-haul aircraft. It will take 300 workers to lay 400,000 m<sup>3</sup> of runway, and safety has to be maintained despite geotechnical challenges, adverse weather conditions and a tight schedule, all while the airport runs at full capacity. VINCI Airports has called on the expertise of VINCI Construction Terrassement and Menard, generating synergies with local partners to share best safety practices such as designating separate lanes for trucks, machinery and workers, providing safety training, ensuring workers take full work breaks and wear personal protective equipment on site at all times, etc. We also worked with Cambodian civil aviation services on safety and operating conditions with airlines. Works are ongoing with a solid safety culture firmly in place and the new infrastructure will be operational by mid-2020.





## IN THE SPOTLIGHT



### WORLDWIDE

## VINCI Highways' safety week

VINCI Highways held its first ever International Safety Week, involving over 5,500 employees from 30 entities across 12 countries. The widespread involvement demonstrates just how committed employees on the ground are to the shared goal of Zero Accidents, and the importance of network synergy in achieving it. Safety is everyone's responsibility and a priority for not only all of our employees, but also our sub-contractors. That is why VINCI Highways' Safety Week featured a number of initiatives open to all, including discussion groups, debates, workshops, virtual and real-life role plays and events for employees' families.



### FRANCE

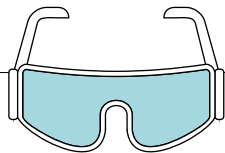
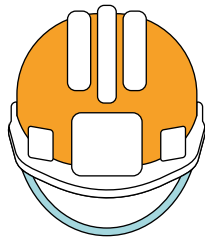
## Safety at the heart of MESEA training

In 2019, MESEA continued to build on the improvements made to its health and safety track record as a strategic focus of its expansion. A large proportion of the workforce are relatively new to the railway profession, which is why the company has undertaken a major management transformation project. The management team at MESEA has set ambitious targets for the next two years and launched a number of internal projects so that all employees can, by the end of 2020, be proactive in ensuring their own safety as well as that of their colleagues. A health and safety committee has been established, and training courses and risk prevention visits are being organised.



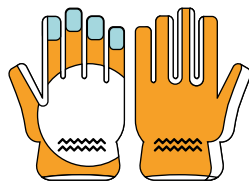
# 30

the number of entities in the VINCI Highways network to participate in the first Safety Week in 2019



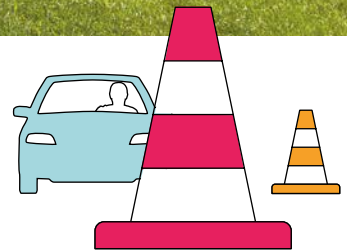
# 51%

fewer accidents in 2019 involving lifting at airports managed by the ANA Group compared with 2017



# 60%

fewer accidents on the Lima expressways since they joined the VINCI Highways network in 2016



# 300

workers are required to extend the runway at Sihanoukville airport in Cambodia. The project must guarantee the safety of everyone involved despite geotechnical challenges, adverse weather conditions and a tight schedule, all while the airport runs at full capacity



# Empowering people

70

POSITIVE MOBILITY MAKERS







**BOCHRA HAMMOU**

General Manager, Sihanoukville airport, Cambodia

"We want to enhance the employee experience, the same way we focus on improving the passenger experience"



**GABRIELA PIANA**

Contract Analyst, Salvador Bahia airport, Brazil

"We encourage diversity in the workplace. We want to give everyone the opportunity to experience inclusive, open and positive mobility."



**MARICEL SILVA**

Senior Coordinator for Social Affairs, Lima Expressa motorway, Peru

"Our long-term vision blends different stories, experiences and cultures to enable us all to play a part in bringing about sustainable and inclusive mobility"





# Cambodia

## A strong human resources policy to sustain long-term growth

Cambodia's Sihanoukville International airport is experiencing unprecedented increases in traffic. The ability to sustain growth while also providing a top-notch passenger experience is rooted in not only the modernisation of airport infrastructure, but also an ambitious human resources policy that ensures quality recruitment, training and social security benefits. Read on to learn about our comprehensive approach.

The Sihanoukville airport handled 1.6 million travellers in 2019, representing an increase of 158%! Such remarkable growth is a reflection of the tourism boom in Cambodia, which last year attracted 6.6 million visitors. We have provided airport staff with tailored support so they can continue bolstering this success. "We want to offer every employee a career, providing them with thorough training to create a positive employee experience, the same way we do with the passenger experience," says airport General Manager Bochra Hammou. "The quality of our services is founded primarily on the motivation of our teams."

### More passengers, more recruitment

In addition to launching various projects and work such as the upcoming construction of a new terminal, it is recruitment that poses the most considerable challenge. In 2012, the Sihanoukville International airport team comprised 40 people, a number that had doubled by 2017 and reached almost 180 in 2019. This momentum opens up more and more career opportunities in Cambodia in a variety of domains and for all levels of expertise, from unskilled workers through

to managerial staff. Additionally, teams increasingly include more women, who make up 53% of the workforce, in line with VINCI Concessions' targets.

### Training programmes and social responsibility

The airport is also looking to training as a means of meeting the challenge of rising traffic, drawing on training materials from the VINCI Airports Academy. Over 50,000 hours of training have been provided in Cambodia, be it in person or online. The HR policy also capitalises on the Multiskills programme, which broadens the skillsets of all employees as a way to give them greater career development opportunities.

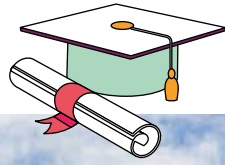
Employee social security benefits constitute a second pillar of the airport's human resources policy. For example, a medical centre was opened onsite for teams and their families. This service represents a distinct privilege in Cambodia, which improves quality of life and employee work conditions and encourages them to stay with the company.





↓  
**ENHANCING  
EMPLOYEES' SKILLS**

Sihanoukville airport is investing in its employees; teams at Cambodia Airports undertook over 50,000 hours of training in 2019.



←  
**A BOOM  
FOR TOURISM**

Cambodia appeals strongly to tourists, attracting almost 7 million travellers last year.





# “Making every employee experience transformative”

**BOCHRA HAMMOU,**  
General Manager,  
Sihanoukville airport, Cambodia

“In Sihanoukville, we’re supporting Cambodia’s economic and touristic growth through several major projects. We’re renovating and extending the runway, building a VIP terminal and a temporary Arrivals terminal, reconfiguring airport access roads and creating new aircraft parking. We’re also building a new passenger terminal that will initially be able to handle 3 million passengers, before capacity ultimately rises to 6 million passengers. Yet our success in meeting the challenge of rising passenger numbers will depend on how we train employees onsite.

Faced with this remarkable growth, our teams have demonstrated an extraordinary ability to adapt. The tangible development in our infrastructure is mirrored in our HR policy, namely with regard to recruitment. In 2020, we will implement an action plan that includes recruitment days, where the airport will be open to prospective employees who want to

learn more about the airport, as well as partnerships with schools and universities to identify talent and effective job advertisement adapted to local customs. We will start looking even further ahead. Internal mobility is one of the pillars of our HR vision, which is why our training policy offers all employees the possibility of changing careers to find what’s best suited to their abilities. A prime example is that of our Director of Human Resources, who began as a chauffeur at Siem Reap airport before starting on the path towards his current job. Internal mobility can also mean moving to a different country in the VINCI Airports network. I myself am a prime example. I had the opportunity to work at the Grenoble Alpes Isère and Clermont-Ferrand airports before becoming General Manager at Sihanoukville. We encourage our employees to broaden their experience by working in our other airports in Cambodia and abroad.” ■



**MARICEL SILVA**  
Senior Coordinator  
for Social Affairs, Lima  
Expresa motorway, Peru



## LIMA EXPRESA, DRIVING GENDER equality IN PERU

Lima Expresa, a VINCI Highways subsidiary and operator of the Peruvian capital's expressways, has made it a priority to encourage equality in the workplace and help women further their careers. Find out more about the many initiatives the company carried out in this pivotal year.

Innovation often stems from a simple observation. For example, in Peru, 28% of companies — mostly SMEs or very small businesses — are led by women and at Lima Expresa, women hold almost 30% of management positions. These figures are encouraging, but we must go even further. Lima Expresa therefore decided to make 2019 a pivotal year for occupational equality.

### **Peru's first female crane operator**

To promote diversity in the workplace, teams from Lima Expresa organised an Equality Week. The event sparked the implementation of a number of managerial campaigns to raise awareness and circulate information. In addition, posters went up not only at toll booths and company offices, but also onsite at client locations in order to focus minds on the issue on a wider level.

The Senior Coordinator for Social Affairs at Lima Expresa, Maricel Silva, explained, "internal career development is another major

focus. For example, we circulated details of job vacancies and encouraged women to apply." The Angeles de la via (angels of the road) programme, created to boost career development in roadway surveillance and assistance professions, has played an important role in this process. "The programme has achieved real results – for example, we now have Peru's first female crane operator working on our projects!" said Maricel Silva. Angeles de la via will enter its second phase in 2020, which will focus on developing leadership skills and training teams.

### **The start of a far-reaching movement**

But the impact of the Equality Week goes beyond our company. The initiative also aims to kick off a widespread national movement by including daughters of employees and beneficiaries of the social inclusion programmes supported by Lima Expresa as part of an effort to bring the issue of gender equality to the fore in Peruvian society.

## IN THE SPOTLIGHT



### WORLDWIDE

## Encouraging women to enter engineering

VINCI Concessions is putting in place an ever-increasing number of initiatives on the ground to change the way people think about women in engineering. London Gatwick invited around 80 local schoolgirls and their mothers to spend a day discovering airport engineering. The Rhônexpress in Lyon, as part of a partnership with the Objectif Pour l'Emploi organisation, gave students the opportunity to go behind the scenes of the light rail shuttle and gain an insight into the diverse array of engineering professions. In Colombia, the teams operating the Bogotá-Girardot motorway held a forum attended by around 170 schoolchildren as part of the "Girls on the move" initiative set up by the organisation Elles Bougent; it was an opportunity to speak with and take inspiration from the careers of women working in engineering who came to share their stories and raise awareness about the importance of STEM subjects.



### BRAZIL

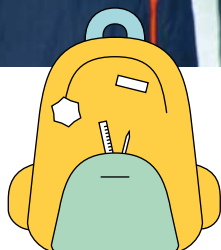
## Salvador Bahia airport taking action for diversity

For the second year in a row, the Salvador Bahia airport received the Ethnic Racial Diversity Certification granted by Salvador City Council in recognition of the action taken to combat institutional racism and promote quality at work. The airport has set up a diversity committee to develop initiatives and stimulate debate on the subject in order to create an innovative and productive work environment. The committee has organised various initiatives, including a workshop to raise awareness about diversity at work, photo exhibitions focusing on people of colour in leadership positions or exploring the themes of inclusion and respecting differences, as well as, a campaign on Gay Pride Day.

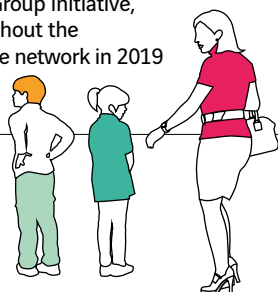




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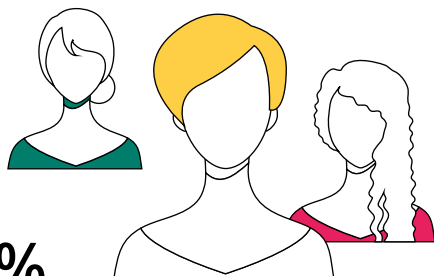


**middle-school pupils** learned about careers in mobility through the VINCI Group initiative, Give Me Five, organised throughout the VINCI Concessions infrastructure network in 2019



Over 5,000

**schoolchildren and their parents** visited Orlando Sanford International Airport to learn about careers in aviation at a special event in January 2020



34%

**of the workforce** in the VINCI Concessions network is made up of women

230

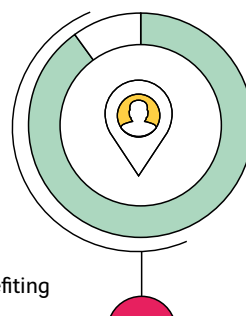


**students** benefited from initiatives to encourage women to enter careers in engineering organised by London Gatwick airport and the Bogotá—Girardot motorway in 2019



80%

**of people employed locally**, creating a positive impact on the entire population and benefiting society as a whole





78

POSITIVE MOBILITY MAKERS

# Innovating together



**SANDRA FERREIRA**


Deputy Airport Manager, Lisbon airport, Portugal

"We focus on both day-to-day innovation and long-term progress. By moving forward in both areas, we are building the future one day at a time"








 **MAXIME VARIN**  
Chief Executive Officer, SunMind, France

"The drop in photovoltaic solar electricity prices combined with the acceleration of electric mobility will open up new opportunities for us as a transport infrastructure concession holder"



 **ABHI CHACKO**  
Head of Innovation, London Gatwick airport, United Kingdom

"The airport of tomorrow will leverage technological progress to provide a seamless customer experience without losing sight of environmental considerations. It will be an enjoyable, connected and responsible destination in its own right"







# REINVENTING travel

As infrastructure is transformed, the way we travel changes — it is becoming an experience, relying on new technologies to achieve better flow management. These trends are revolutionising the mobility sector, but what exactly do they entail? And what solutions is VINCI Concessions putting in place?

80

## New expectations

For today's travellers, the journey is no longer just about getting from A to B; it's an opportunity to enjoy a range of services and cultural discoveries. For example, VINCI Concessions has put in place a solution at Lyon airport, where it teamed up with the city's Contemporary Art Biennale to display artwork by Abraham Poincheval throughout Terminal 1. Moreover, seven French airports in the VINCI Airports network will host an exhibition on airport biodiversity in 2020. In Colombia, drivers on the Bogotá—Girardot motorway can listen to a special playlist featuring music that complements the magnificent landscapes along the route.

## Smoother passenger flows

In 2019, worldwide air traffic grew by over 3%,<sup>(1)</sup> and more than 90 million new cars were sold internationally.<sup>(2)</sup> Efficiently managing passenger flows has become a key focus of mobility. Combining effective data analysis with other technological innovations such as mobile applications, facial recognition and mobile payment solutions is proving essential to relieving congestion. For example,

VINCI Concessions has put in place a solution in the United States, where VINCI Highways manages 75 million free-flow transactions per year — meaning that these drivers no longer need to stop or even slow down to pay toll charges.

## Smart infrastructure

Railways, airports and motorways are evolving, fuelled by technological progress. Through increasingly advanced data collection and analysis, infrastructure can now “communicate” with design and maintenance teams throughout its entire life cycle by transmitting key information in real time. For example, VINCI Concessions has put in place a solution on the SEA HSL to share all information needed to guarantee its smooth operation. As a result, its regularity has reached 97%. The line's operator, MESEA, has put forward a number of innovations, including an algorithm that processes the geometric data from the railway, according to 13 parameters, for every 25 centimetres of rail. In addition, an application is currently under development to monitor incidents in real time.

(1) Source: International Air Transport Association (IATA), October 2019.

(2) Source: Euler Hermes study, September 2019.

# Mobility as a service in California, Dublin and Texas

With contactless toll collection, interoperability, and integrated customer relations platforms, the teams from VINCI Highways are innovating to create smoother traffic flows and improve the experience for drivers throughout the world. Here's a look at three stand-out projects.



## **California drivers enjoy smoother traffic on the 91 Express Lanes**

At the start of 2020, VINCI Highways renewed a seven-year contract with local government authorities in Orange and Riverside counties in California to continue operating the 91 Express Lanes and its contactless toll services. VINCI Highways has operated the motorway since 1995 and proven its ability to constantly adapt to customer needs by offering the most cutting-edge technologies. The Tollplus company, in which VINCI Highways holds a share, will manage a new digitalised back-office system that will make it easier to manage the nearly 40 million electronic toll transactions per year.

## **Next generation customer relations on Dublin's ring road**

Every day, 145,000 vehicles travel along the M50, Dublin's ring road. In 2019, Dublin chose to work with the joint venture set up between VINCI Highways and Abtran to upgrade payment management and subscriptions services on this strategic motorway. Among the many fresh features to be rolled out in 2020 is a new

back-office platform to make payment easier for drivers and improve customer relations with a new global communication platform featuring a call centre and various digital interfaces.

## **More mobility and less traffic in Texas**

The state of Texas is continuing to invest in expanding free-flow toll payment technology in partnership with VINCI Highways. After signing contracts with the Central Texas Regional Mobility Authority and the North Texas Tollway Authority in 2018, we rolled out new back-office systems in 2019, optimising payment solutions for drivers. We opened an additional contact centre to handle large numbers of calls and further solidify our customer relations. Subscription levels in 2019 exceeded local government targets, proving the appeal of these new services.



# Lisbon

## Airport innovations to handle greater passenger numbers

Lisbon airport is attracting more passengers than ever. To facilitate this expansion while improving the passenger experience, VINCI Airports has put in place a number of large-scale projects harnessing biometrics to manage passenger flows.

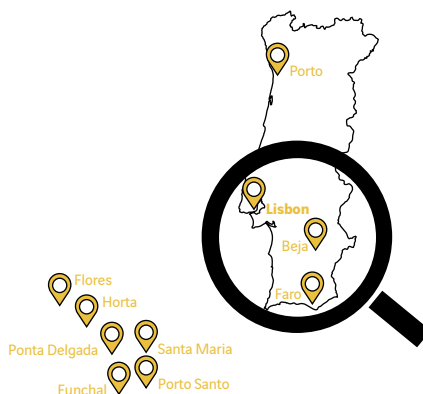
Lisbon airport mirrors the changes occurring in the city itself. Since the partnership with VINCI Concessions was established in 2013, the Portuguese capital has attracted an ever-increasing number of tourists and successfully reinvented itself without losing its soul. In 2019, Lisbon airport reached a significant milestone, handling over 31 million passengers. Moreover, in just six years, air traffic has more than doubled in Portugal.

### Walkthrough biometrics

To absorb this considerable growth while maintaining flow efficiency and a high-quality passenger experience, Lisbon airport has looked to new technologies to reach a solution. A biometric passenger identification system designed in collaboration with Frontex, the European border and coast guard agency, facilitates the airport experience for European citizens over the age of 18 living in the Schengen Area. From check-in through to boarding, passengers are identified as they walk, without having to stop and wait, thanks to a free-flow system of cameras and contactless fingerprint scanners.

Over 1,500 passengers took part in the trial phase. They gave very positive feedback and the majority wanted to know if the technology would soon be rolled out across the entire airport. The next step is approving the solution for use at Terminal 2 to improve the passenger experience and grow capacity.

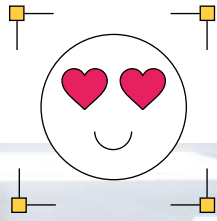
Chosen to be one of VINCI Concessions' five centres of excellence for Innovation, Lisbon airport will continue to trial and implement intelligent terminal solutions that, if successful, could be rolled out to the rest of the network.





↓  
**A CENTRE OF EXCELLENCE  
FOR INNOVATION**

Lisbon airport trials and implements intelligent terminal solutions in order to continue optimising passenger flows and provide a seamless experience.



## IN THE SPOTLIGHT



### WORLDWIDE

## 1<sup>st</sup> Innovate challenge by VINCI Concessions

The Innovate programme at VINCI Concessions is designed to promote an innovation culture on the ground. To help us achieve this goal, we organised the first ever international Innovation challenge. This year's challenge called for ideas to eliminate plastic use. Teams from across our network submitted a total of 260 ideas for initiatives aimed at reducing the use, sale, or discarding of plastic at our sites and offices. The winning initiative by majority vote came from a collaboration between teams at Nantes and Kansai airports, whose idea was to install self-service fountains in shops and restaurants rather than sell bottled beverages. We will soon begin trialling the idea.



### JAPAN

## VINCI Airports rolls out powered exoskeletons

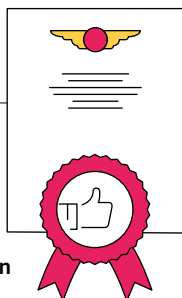
Following a trial phase that yielded very positive results, VINCI Airports deployed powered exoskeletons in the international cargo area of Kansai International Airport in Japan. The purpose of this new piece of equipment is to make work less strenuous for the teams sorting cargo. As such, VINCI Airports is able to meet increasing demand while continuing to prioritise security and safety.



FRANCE

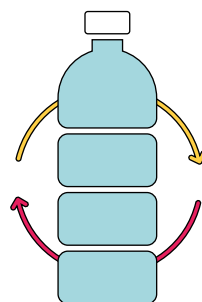
## Intrapreneurship at VINCI Concessions

With SunMind, VINCI Concessions is taking another step towards achieving solar self-sufficiency. A project manager from VINCI Concessions came up with the idea for SunMind. The project aims to provide businesses with reliable, competitively priced electricity produced by photovoltaic systems installed onsite and financed by SunMind. The company joined VINCI Concessions to step up its development after an initial incubation phase with Leonard, the VINCI Group's foresight and innovation platform. Various projects are under consideration in France and Portugal, and a contract to develop Faro airport has already been signed.



5

centres of excellence for Innovation developing new solutions to benefit the entire VINCI Concessions network: Lyon, Lisbon, London, Lima and Bordeaux—Villongnon

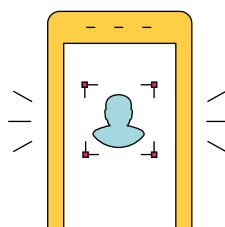
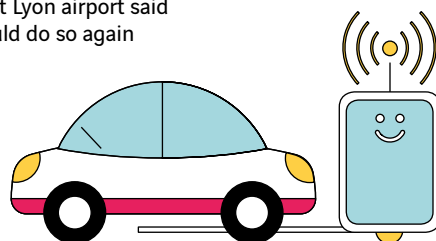


260

ideas put forward for Ideas vs Plastic, the first VINCI Concessions innovation challenge

95%

of people who have used the robotic valet parking system at Lyon airport said they would do so again



1,500

took part in the walkthrough biometrics trial at Lisbon airport in 2019



# Public-private partnerships of VINCI's concessions business worldwide

The public-private partnerships listed below are managed by VINCI's concessions business. In addition, a number of other public-private partnerships (mostly related to buildings) are managed by VINCI's contracting business.

Infrastructure	Description	Country	Stake held	End of contract
AIRPORTS				
	Chambéry, Clermont-Ferrand, Grenoble Alpes Isère, Pays d'Ancenis <sup>(5)</sup>	France	100%	From 2025 to 2029
	Lyon-Bron, Lyon	France	31%	2047
	Nantes Atlantique <sup>(6)</sup>	France	85%	2021
	Saint-Nazaire Montoir <sup>(6)</sup>	France	85%	2021
	Rennes, Dinard <sup>(5)</sup>	France	49%	2024
	Toulon Hyères	France	100%	2040
	Salvador Bahia	Brazil	100%	2047
	Phnom Penh, Siem Reap, Sihanoukville	Cambodia	70%	2040
	Santiago de Chile <sup>(1)</sup>	Chile	40%	2035
	Guanacaste	Costa Rica	45%	2030
	Orlando Sanford, Florida	United States	100%	2039
	Hollywood Burbank, California <sup>(7)</sup>	United States		2020
	Atlantic City, New Jersey <sup>(7)</sup>	United States		2021
	Macon Downtown, Georgia <sup>(7)</sup>	United States		2022
	Middle Georgia, Georgia <sup>(7)</sup>	United States		2022
	Kansai International, Osaka Itami, Kobe	Japan	40%	2060
	Lisbon, Porto, Faro, Beja, Ponta Delgada, Horta, Flores, Santa Maria, Funchal, Porto Santo	Portugal	100%	2063
	Saint Domingo (Las Américas and La Isabela), Puerto Plata, Samaná (Presidente Juan Bosch and Arroyo Barril), Barahona	Dominican Republic	100%	2030
	Belfast International	United Kingdom	100%	2993
	London Gatwick	United Kingdom	50.01%	Freehold ownership
	Belgrade	Serbia	100%	2043
	Stockholm Skavsta	Sweden	90%	Freehold ownership

HIGHWAY AND ROAD INFRASTRUCTURE	NETWORK CONCESSIONS			
Arcos (A355 – western Strasbourg Bypass) <sup>(1)</sup>	24 km	France	100%	2070
Arcour (A19)	101 km	France	100%	2070
ASF network (excl. Puymorens tunnel)	2,731 km	France	100%	2036
Cofiroute network (excl. A86 Duplex tunnel)	1,100 km	France	100%	2034
Escota network	471 km	France	99.5%	2032
Motorway A4 Horselberg	45 km	Germany	50%	2037
Motorway A5 Malsch-Offenburg	60 km	Germany	54%	2039
Motorway A7 <sup>(1)</sup> Bockenem-Göttingen	60 km	Germany	50%	2047
Motorway A9 Thuringia/Bavarian border	47 km	Germany	50%	2031
Regina Bypass	61 km	Canada	38%	2049
Fredericton-Moncton Expressway <sup>(2)</sup>	195 km	Canada	25%	2028
Bogotá—Girardot motorway <sup>(1)</sup>	141 km <sup>(3)</sup>	Colombia	50%	2042
Athens Corinth—Patras motorway	201 km	Greece	30%	2038
Maliakos—Kleidi motorway	230 km	Greece	15%	2038
Lima expressway	25 km	Peru	100%	2049

Infrastructure	Description	Country	Stake held	End of contract
Newport bypass	10 km	United Kingdom	50%	2042
Isle of Wight road network <sup>(4)</sup>	821 km of roads and 767 km of pavements	United Kingdom	50%	2038
Hounslow road network <sup>(4)</sup>	432 km of roads and 762 km of pavements	United Kingdom	50%	2037
Moscow—Saint Petersburg motorway (MSP0)	43 km (Moscow—Sheremetyevo)	Russia	50%	2040
Moscow—Saint Petersburg motorway (MSP7 and 8)	138 km (Saint-Petersburg—Veliky Novgorod)	Russia	40%	2041
Expressway R1 (PR1BINA)	51 km	Slovakia	50%	2041

#### BRIDGES AND TUNNELS

Duplex A86 tunnel	Rueil-Malmaison—Jouy-en-Josas/Versailles (11 km)	France	100%	2086
Prado-Carénage tunnel	Tunnel in Marseille (2.1 km)	France	33%	2033
Southern Prado tunnel	Tunnel in Marseille (1.9 km)	France	59%	2055
Puymorens tunnel	Tunnel in the Pyrenees (5.5 km)	France	100%	2037
Confederation bridge	Prince Edward Island—mainland	Canada	20%	2032
Ohio River Bridges—East End Crossing	Bridges and tunnel connecting Kentucky and Indiana	United States	33%	2051
Rion-Antirion bridge	Peloponnese—mainland	Greece	57%	2039
Bridges on the Tagus	Two bridges in Lisbon	Portugal	41%	2030

#### RAILWAY INFRASTRUCTURE

GSM-Rail	Radio communication system over 16,000 km of railway lines	France	70%	2025
SEA HSL	High-speed rail line between Tours and Bordeaux (302 km)	France	33%	2061
Rhôneexpress <sup>(8)</sup>	Light rail line (23 km) in Lyon	France	35%	2038

#### STADIUMS

Bordeaux Stadium (Matmut-Atlantique)	42,000 spaces	France	50%	2045
Stade de France	80,000 spaces	France	67%	2025
Le Mans Stadium (MMArena)	25,000 spaces	France	100%	2044
Nice Stadium (Allianz-Riviera)	36,000 spaces	France	50%	2041

#### OTHER PUBLIC FACILITIES

Automation of river dams (Bameo) <sup>(1)</sup>	31 dams on the Aisne and the Meuse rivers	France	50%	2043
Nice-Côte d'Azur Airport car rental centre	Building of 60,000 m <sup>2</sup>	France	100%	2040
Public street lighting in Goussainville, France		France	100%	2026
Public street lighting in Rouen, France (Lucitea)		France	100%	2027
Martinique BRT	2.5 km	France	100%	2035

(1) Construction in progress.

(2) Routine maintenance contract.

(3) Including 65 km to be extended.

(4) Renovation, routine and heavy maintenance contract.

(5) Contracts for service, management or delegation of public service.

(6) Termination for reasons of public interest decided on 24 October 2019, with effect from 15 December 2021.

(7) Service contract.

(8) On 21 February 2020, Sytral (concession grantor) decided to terminate the concession contract for reasons of public interest.

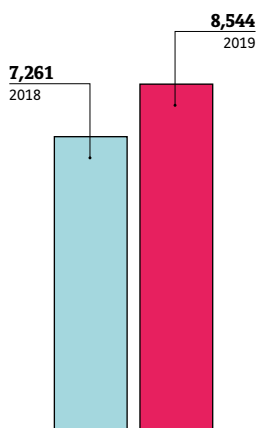
# Financial indicators for the VINCI Group's concessions

Consolidated data for VINCI Group concessions, including VINCI Autoroutes and VINCI Stadium

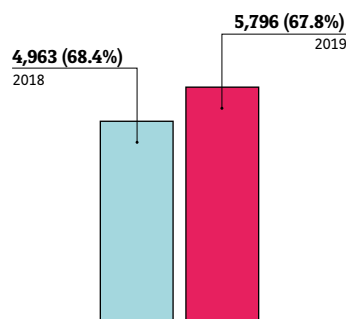
88

POSITIVE MOBILITY MAKERS

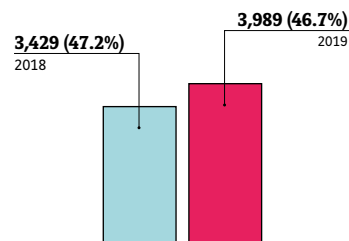
**REVENUES<sup>(1)</sup>**  
(in M€)



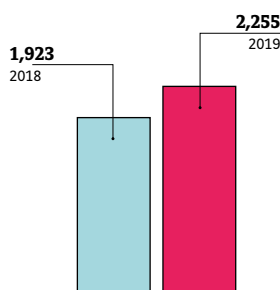
**EBITDA<sup>(2)</sup>**  
(in M€ and percentage of revenues<sup>(1)</sup>)



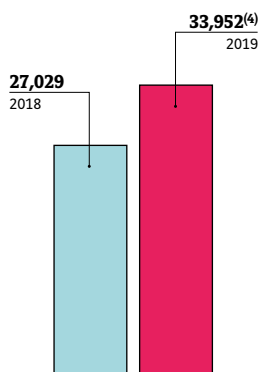
**OPERATING INCOME FROM OPERATIONS**  
(in M€ and percentage of revenues<sup>(1)</sup>)



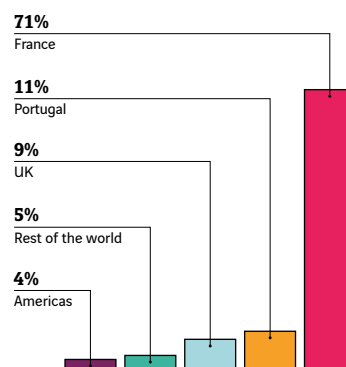
**NET INCOME ATTRIBUTABLE TO EQUITY HOLDERS OF THE PARENT**  
(in M€)



**NET FINANCIAL DEBT<sup>(3)</sup>**  
(in M€)



**REVENUES<sup>(1)</sup> BY GEOGRAPHICAL AREA**  
(percentage)



(1) Excluding concession subsidiaries' works revenue.

(2) Cash flow before taxes and cost of net debt.

(3) At 31 December.

(4) Including motorways and stadia.



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Opening opportunities

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